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PeopleSoft

PeopleSoft CRM 9.2: PeopleSoft Product and Item Management

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

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In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
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.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

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ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific 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 region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- 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 the PeopleSoft Online Help:

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

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

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Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft CRM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

PeopleSoft Spotlight Series

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Please include the applications update image or PeopleTools release that you're using.

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Chapter 1

Getting Started with PeopleSoft CRM Product and Item Management

PeopleSoft CRM Product and Item Management Overview

In PeopleSoft CRM, products are what you sell and support. Almost all customer-facing PeopleSoft CRM applications reference product data, including (but not limited to) PeopleSoft CRM: Field Service, Support and Help Desk, Sales, Order Capture, and Marketing. You can group and present product information in catalogs for use by the sales force or by self-service applications, plan sales and marketing campaigns around products, manage product portfolios, or identify the competencies required to service and support a product and use that to assign workers to service and support tasks.

This documentation discusses setup tasks and data management for products and items in PeopleSoft CRM, including how to define and price product packages and standalone products.

PeopleSoft CRM Product and Item Integrations

PeopleSoft CRM integrates with PeopleSoft Supply Chain Management (SCM) and with other SCM, or order fulfillment, systems. PeopleSoft SCM systems use product definitions to manage products and product components throughout the manufacturing process. PeopleSoft CRM delivers several enterprise integration points (EIPs) that maintain data integrity between PeopleSoft CRM and third-party SCM systems by synchronizing product and item data.

PeopleSoft CRM Product and Item Implementation

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

You set up products and items as part of the implementation process for PeopleSoft CRM products such as PeopleSoft Integrated FieldService and PeopleSoft Order Capture.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

See Also

PeopleTools: Setup Manager

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PeopleTools: Component Interfaces

Application Fundamentals

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Chapter 2

Understanding Products and Items in PeopleSoft CRM

Products

Products in PeopleSoft Customer Relationship Management (PeopleSoft CRM) are what you sell to customers, for example, physical goods such as electric fans and cars, or packages such as custom built refrigerators.

Product Definitions

PeopleSoft CRM represents products by product definitions. A product definition, keyed by product ID and setID, stores all of the product information that company representatives reference to sell or support products.

A product definition and its associated price setup provide the foundation for many features of PeopleSoft CRM, which include product ordering, catalogs, catalog searches, and dynamic product packages that are accessed from applications such as PeopleSoft Order Capture, PeopleSoft Order Capture Self Service, PeopleSoft Sales, and so forth. You also use products in PeopleSoft Integrated FieldService, PeopleSoft Support, and PeopleSoft HelpDesk for on-site and off-site customer support processing.

Use the Product Definition component to define products. If you implement both PeopleSoft CRM and PeopleSoft Supply Chain Management (PeopleSoft SCM) or another third-party supply chain management system, you can use the Product enterprise integration point (EIP) to synchronize product data between the two systems.

Note: If you integrate between PeopleSoft CRM and a supply chain management system, you should define all product records in the PeopleSoft CRM system to take advantage of functionality, such as dynamic product packages and configured products, that are offered only in PeopleSoft CRM.

Types of Product Definitions

The types of product definitions in PeopleSoft CRM are:

- Engagement service

  Engagement services are services such as consulting that are priced by PeopleSoft Proposal Management. PeopleSoft CRM integrates with PeopleSoft Proposal Management to exchange quote, status, and pricing information.

  See Integrations with PeopleSoft SCM and PeopleSoft Proposal Management.

- Standard product

  Standard, or standalone, products do not contain components. When you define a product, you select whether it is standalone or contains components (product package).

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- Package product

  Product packages contain more than one component. A product package can include other packages and are priced either at the product level or as the sum of the package components. When you define a product package, you designate the pricing method.

  Package products can be configured (lightly configured packages) using the Package Components Page

Related Links

Understanding Product Definitional Elements
Understanding Products in PeopleSoft CRM

Items

Items are tangible goods or materials that an organization keeps in stock for sale or use in the future. You use items to keep track of material stocks—goods that are located in physical storage locations such as warehouses, storerooms, or service trucks—in the inventory control system.

Item Definition

You define items either by using the Item Definition component or by using the Item Primary EIP to integrate with an inventory or purchasing system.

Because the synchronization of item definitions is one-way from the inventory or purchasing system to the PeopleSoft CRM system, PeopleSoft suggests that you create and update item records in the inventory or purchasing system, then publish them to PeopleSoft CRM.

Note: If you integrate with an inventory or purchasing system, you are unable to update the item definition within PeopleSoft CRM.

Related Links

Understanding Item Definition in PeopleSoft CRM
“Setting Up the Order Materials Component” (PeopleSoft Integrated FieldService)

The Relationship Between Products and Items

In PeopleSoft CRM, a product is associated with only one item (one-to-one relationship). For any physical product that you sell in-store, there is an item equivalent in the inventory system, which establishes the one-to-one relationship. You stock the item on the warehouse shelf and use it for fulfilling orders of that product.

More than one product can use the same item. This typically happens when you position or price the same item differently for different product lines.

Items are associated with products for fulfillment and servicing purposes in PeopleSoft CRM.

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See Defining Creation and Update Rules for Installed Products.

Items in PeopleSoft Integrated FieldService

In PeopleSoft CRM, products are used in the Installed Product and Services component and are required. Items are an option in the Installed Product and Services component. The Installed Assets component is for internal assets that are used in PeopleSoft HelpDesk.

Service technicians order items that they need to perform service using the Order Materials component, either as an interunit transfer or purchase order. After the purchasing or inventory system processes the order and ships an item to the technician's truck, the technician installs the item and uses the Time Material Expense page within the Service Order component to report the receipt and usage of the new item, as well as the removal of the old one.

You can set up rules to govern when the system creates or changes the status of installed products.

For example, the system creates an installed product or changes its status when:

- A product is ordered through PeopleSoft Order Capture.
- An automatic shipping notification (ASN) for the product is received from a fulfillment system.
- A material usage or removal is recorded in PeopleSoft Integrated FieldService.

When these activities occur, the PeopleSoft CRM system passes product information along with the inventory system serial number (if applicable) to the installed product.

For example, an electrical appliance retailer might keep stock in a warehouse. The inventory system associates each product with an item on the warehouse shelf. When a customer places a product order and the order comes through the fulfillment system, the associated item of the product is picked from the warehouse and shipped.

The serial number is sent as part of the ASN message, which triggers either the creation of an installed product for the shipped product or an update of the existing installed product for that product.

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Chapter 3

Setting Up Product Definitional Elements

Understanding Product Definitional Elements

Definitional elements describe products in the PeopleSoft Customer Relationship Management (PeopleSoft CRM) system. You must set up these definitional elements before defining products in PeopleSoft CRM:

- Product installation options.
- Rules for generating product ID numbers.
- Rule sets for creating and updating installed products.
- Product groups.

  Product groups enable you to share processing parameters between products. PeopleSoft CRM delivers a set of basic product groups.
- Product categories.

  Product categories are used to group products in catalogs.
- Product brands.
- Competitor codes.

  Competitor codes enable you to keep track of competitors' similar products.
- Branch scripts.

  Branch scripts predefine sales dialogue with customers, provide direction to customer service representatives, and guide internal processes and operations.
- Region IDs.

  Region IDs enable selling by region.
- Competency codes.

  Competency codes define the skills required to support the product.
- Relationship IDs.

  Relationship IDs define the relationship of one product to another. For example, one product might either complement or substitute for another product.
- Product attributes.

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Product attributes describe characteristics of the product, such as height, weight, color, and so forth.

Related Links

"Setting Up Automatic Numbering" (Application Fundamentals)
Understanding Item Definition in PeopleSoft CRM
Understanding Installed Products
"Understanding Competencies in PeopleSoft CRM" (Application Fundamentals)
"Setting Up Regions" (Application Fundamentals)
"Understanding Attributes" (Automation and Configuration Tools)
"Understanding Scripts" (Automation and Configuration Tools)

Creating Product Definitional Elements

To create product definitional elements, use the Product Installation (PROD_INSTALLATION), Automatic Numbering (AUTO_NUM_PNL), Product Group (PROD_GROUP_TBL), Product Category (PROD_CATEGORY), Product Brand (PROD_BRAND), Competitors (COMPETITOR_CD), Region (RB_REGION), Attribute Definition (RB_ATTRIBUTE), and Auto Numbering (AUTO_NUM_PNL) components.

Pages Used to Set Up Product Definitional Elements

Page Name	*Definition Name*	*Usage*
Product Installation Page	PROD_INSTALLATION	Select options for managing products.
Installed Product Defaults Page	RF_INSTPRD_DFLT	Specify rules that determine how system transactions create and update installed products.
Setup Auto Numbers Page	AUTO_NUM_PNL	Define automatic numbering options for product IDs.
Product Group Page	PROD_GROUP_TBL	Define product group codes.
Linked Products Page	PROD_GRP_OVERVIEW	View products that belong to a product group.
Product Category Page	PROD_CATEGORY	Define product category codes.
Product Brand Page	PROD_BRAND	Define product brand codes.
Competitors Page	COMPETITOR_CD	Define competitor codes.

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Page Name	*Definition Name*	*Usage*
Script Page	RC_BS_MAIN	Define a branch script for support and sales personnel.
Region Page	RB_REGION	Set up regions.
Competencies Page	COMPETENCY_TABLE	Establish competency codes.
Product Relations Codes Page	RB_RELATIONS	Set up the codes that describe relationships between products.
Attribute Definition Page	RB_ATTRIBUTE_MAIN	Define a product attribute.

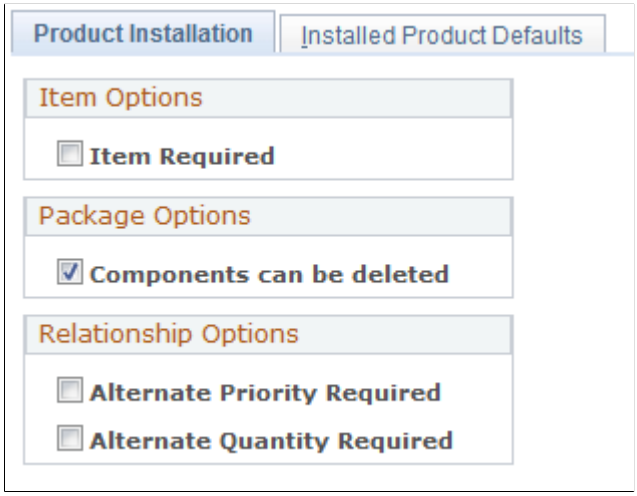
Product Installation Page

Use the Product Installation page (PROD_INSTALLATION) to select options for managing products.

Navigation:

Set Up CRM > **Install** > **Product Options** > **Product Installation**

This example illustrates the fields and controls on the Product Installation page.



Field or Control	*Description*
Item Required	Select if you have installed PeopleSoft Supply Chain Management (PeopleSoft SCM) or PeopleSoft Integrated FieldService. You can deselect this check box if the order fulfillment system does not require items or if products are not inventoried. If you select this check box, you must use the Item Definition component to define product IDs, descriptions, and standard units of measure. You then complete the product definition in the Product Definition component.
Components can be deleted	Select to enable deletion of components in a product package.
Alternate Priority Required and **Alternate Quantity Required**	Select to enter a priority and quantity on the Product Relationships page for an alternate relationship type. Select these check boxes when the PeopleSoft CRM system is integrated with PeopleSoft SCM.

Related Links

Understanding Item Definition in PeopleSoft CRM

Installed Product Defaults Page

Use the Installed Product Defaults page (RF_INSTPRD_DFLT) to specify rules that determine how system transactions create and update installed products.

Navigation:

Set Up CRM > **Install** > **Product Options** > **Installed Product Defaults**

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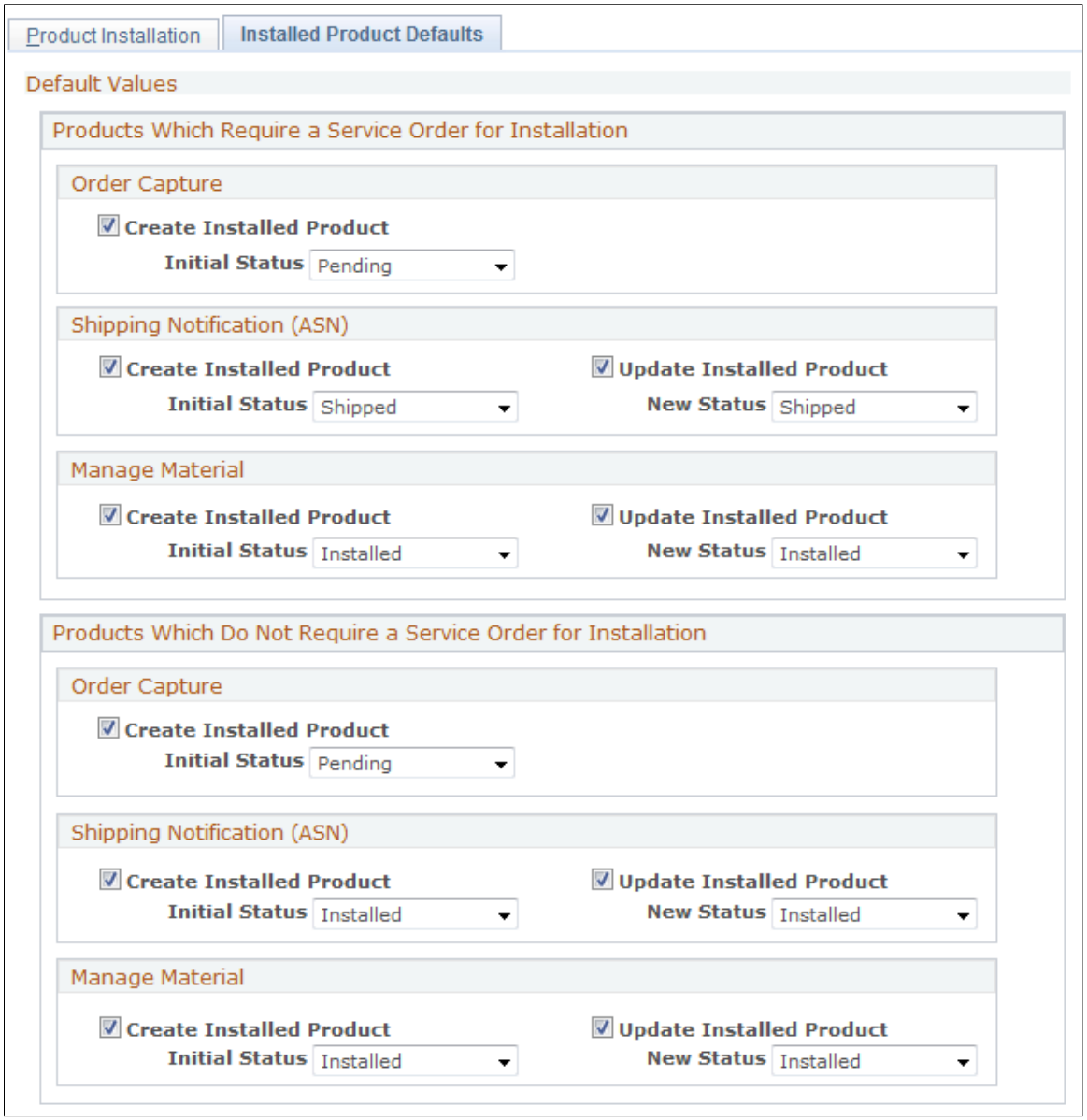
This example illustrates the fields and controls on the Installed Product Defaults page.



See Understanding Installed Products.

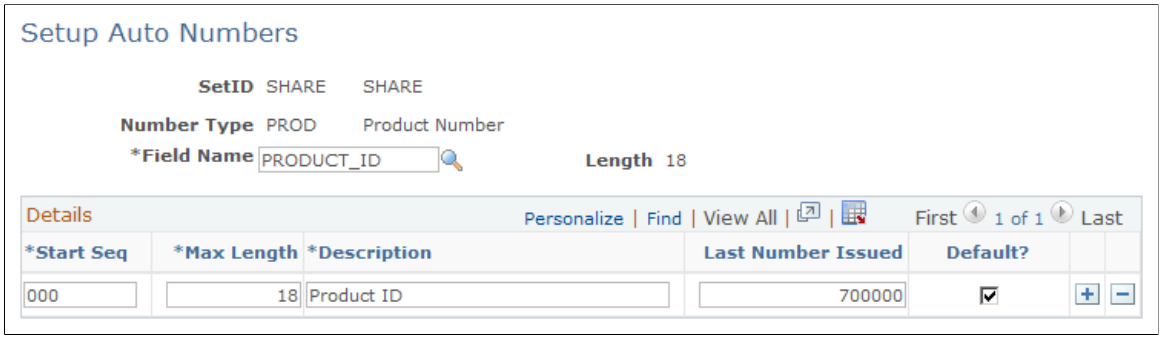
Setup Auto Numbers Page

Use the Setup Auto Numbers page (AUTO_NUM_PNL) to Define automatic numbering options for product IDs.

Navigation:

Set Up CRM > **Common Definitions** > **Codes and Auto Numbering** > **Automatic Numbering** > **Auto Numbering**

This example illustrates the fields and controls on the Setup Auto Numbers page.



See “Setting Up Automatic Numbering” (Application Fundamentals).

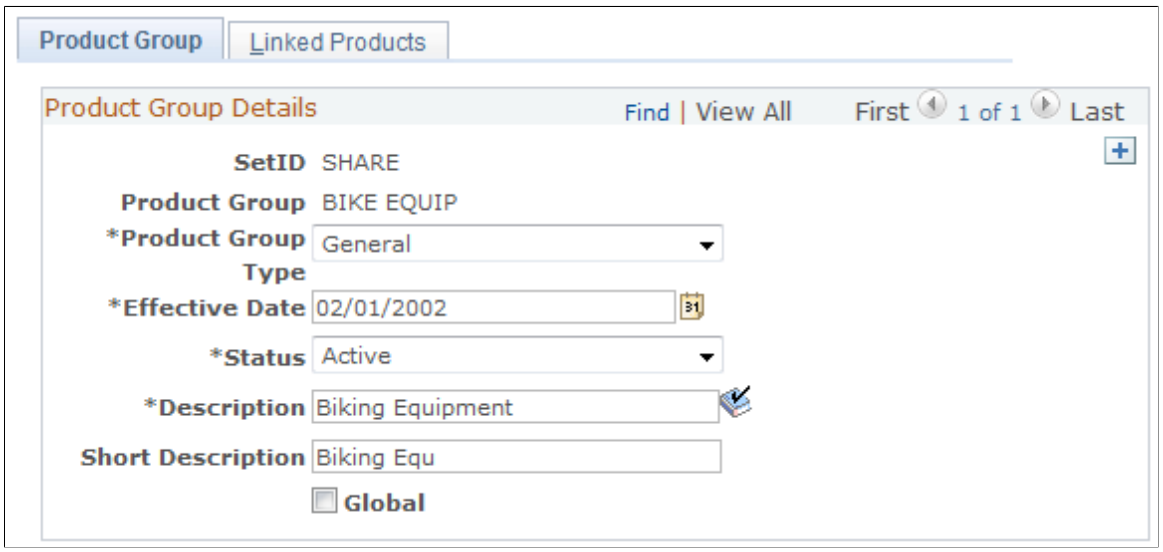
Product Group Page

Use the Product Group page (PROD_GROUP_TBL) to define product group codes.

Navigation:

Products CRM > **Product Groups** > **Product Group**

This example illustrates the fields and controls on the Product Group page.



Note: You cannot delete a product group from this page. If you integrate your PeopleSoft CRM applications with your PeopleSoft SCM applications, the system would also delete the product from your SCM database. This happens because SCM subscribes to a message that the CRM database publishes. If the system allowed you to delete the product group from this page, it could cause problems in your SCM operating environment. As such, this design is intentional.

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Field or Control	*Description*
Product Group Type	Select the product group type from these values: • *Accounting* • *Buying Agreement* • *Customer Target* • *Forecast* • *Freight* • *General* • *Literature* • *Organization* • *Pricing* • *Product Catalogs* • *Product Line* • *Reporting* • *Reporting Externally* • *Reporting Internally* • *Self-Service Products* • *Tax* • *Transportations* • *VAT*
Global	Select to include all products in the product group. **Note:** This selection is not used for product groupings in the catalog. See Understanding Catalogs.

Related Links

Product Definition - Product Groups Page

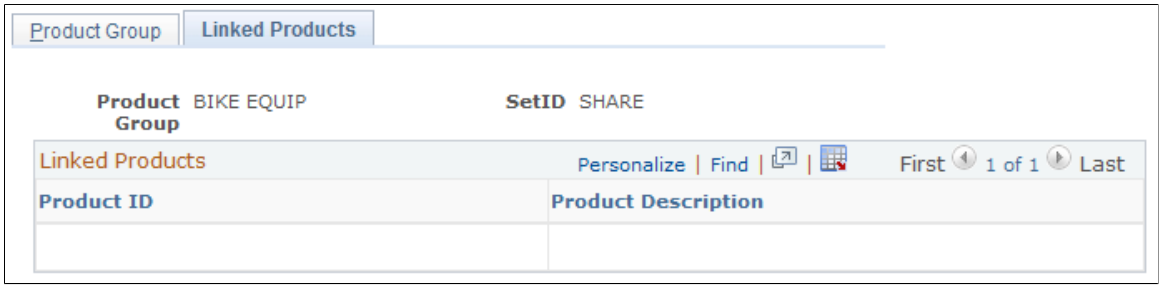
Linked Products Page

Use the Linked Products page (PROD_GRP_OVERVIEW) to view products that belong to a product group.

Navigation:

Products CRM > Product Groups > Linked Products

This example illustrates the fields and controls on the Linked Products page.



This page displays the active products that are included in the product group.

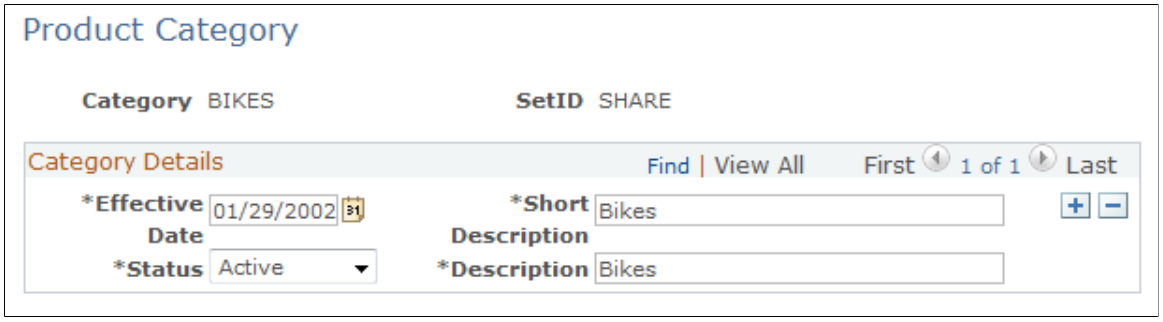
Product Category Page

Use the Product Category page (PROD_CATEGORY) to define product category codes.

Navigation:

Products CRM > Product Category > Product Category

This example illustrates the fields and controls on the Product Category page.



Use this page to define product category codes. Enter the date the product category will be effective, short and long descriptions, as well as the status; either *Active* or *Inactive.*

Product Brand Page

Use the Product Brand page (PROD_BRAND) to define product brand codes.

Navigation:

Products CRM > Product Brand > Product Brand

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This example illustrates the fields and controls on the Product Brand page.

Use this page to define product brands. Enter the date the product brand will be effective, short and long descriptions, as well as the status; either *Active* or *Inactive.*

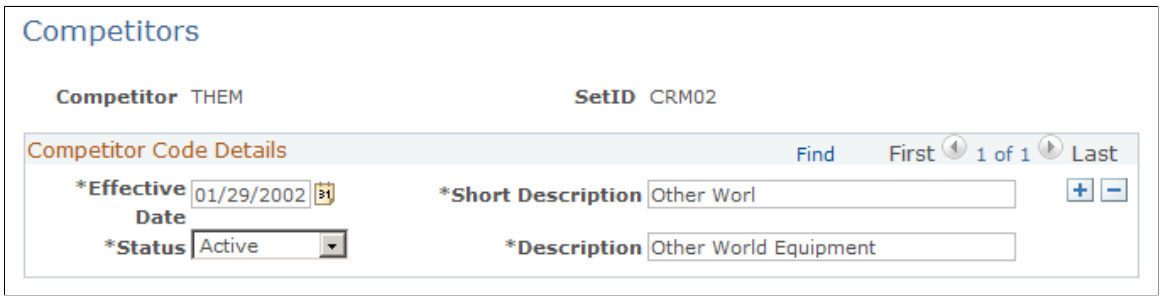
Competitors Page

Use the Competitors page (COMPETITOR_CD) to define competitor codes.

Navigation:

Products CRM > **Competitors** > **Competitors**

This example illustrates the fields and controls on the Competitors page.



Enter competitor information on this page. Enter the date the competitor will be effective, short and long descriptions, as well as the status; either *Active* or *Inactive.*.

Script Page

Use the Script page (RC_BS_MAIN) to define a branch script for support and sales personnel.

Navigation:

Set Up CRM > **Common Definitions** > **Process Automation** > **Script** > **Script**

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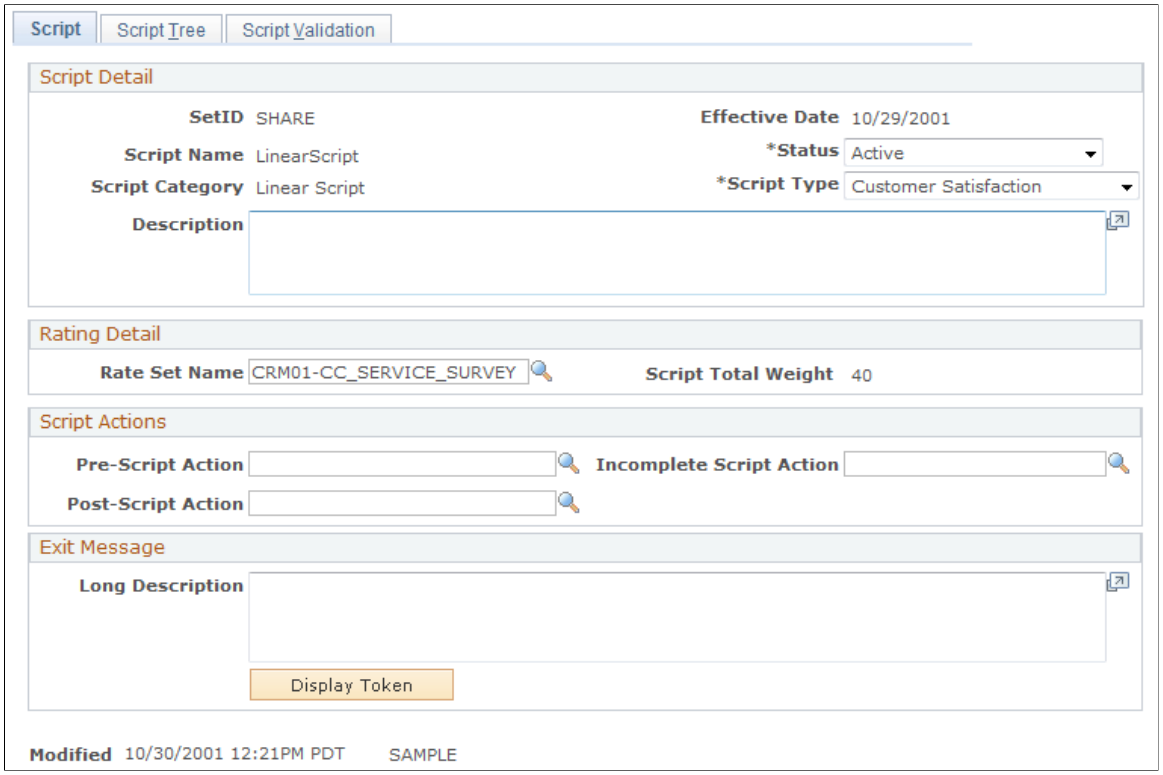
This example illustrates the fields and controls on the Script page.



See “Understanding Scripts” (Automation and Configuration Tools).

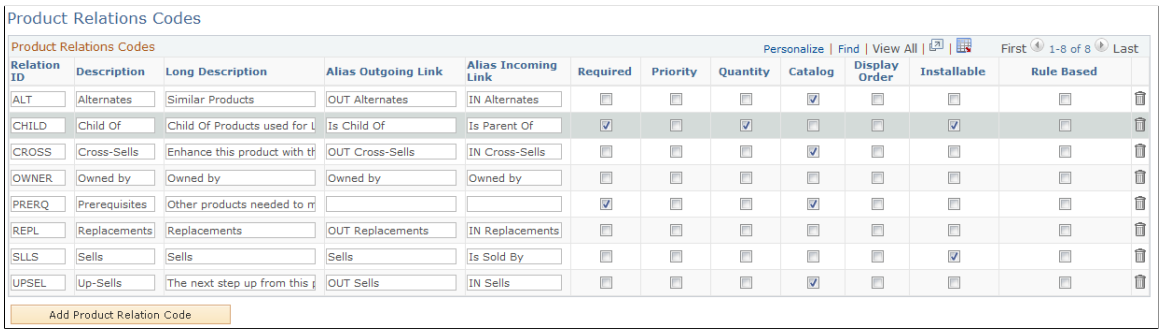
Product Relations Codes Page

Use the Product Relations Codes page (RB_RELATIONS) to set up the codes that describe relationships between products.

Navigation:

Products CRM > Product Relations Codes > Product Relations Codes

This example illustrates the fields and controls on the Product Relations Codes page.



The Product Relations Codes page lists the possible relationships among products of all types that are supported in the product definition model. The options that you select for a relationship type determine the options that are available on the Product Relationships page when you define a product.

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Field or Control	*Description*
Required	Select to include the **Required** check box on the Product Relationships page. The **Required** check box enables you to require that the related product is present whenever the listed product appears.
Priority	Select to include the **Priority** check box on the Product Relationships page. The **Priority** check box enables you to specify a priority among alternative related products.
Quantity	Select to include the **Quantity** field on the Product Relationships page. The **Quantity** field enables you to specify how many times the given relationship can occur.
Catalog	Select to include the **Catalog** check box on the Product Relationships page. The **Catalog** check box controls whether related products appear in the catalog along with the main product.

Note: The product relations codes that appear in the preceding example are delivered as system data. You can add relations, but you should not remove any delivered relations.
These fields are not used in the CRM system: **Alias Outgoing Link**, **Alias Incoming Link**, **Installable** and **Rule Based.**

Related Links

Managing Product Relationships

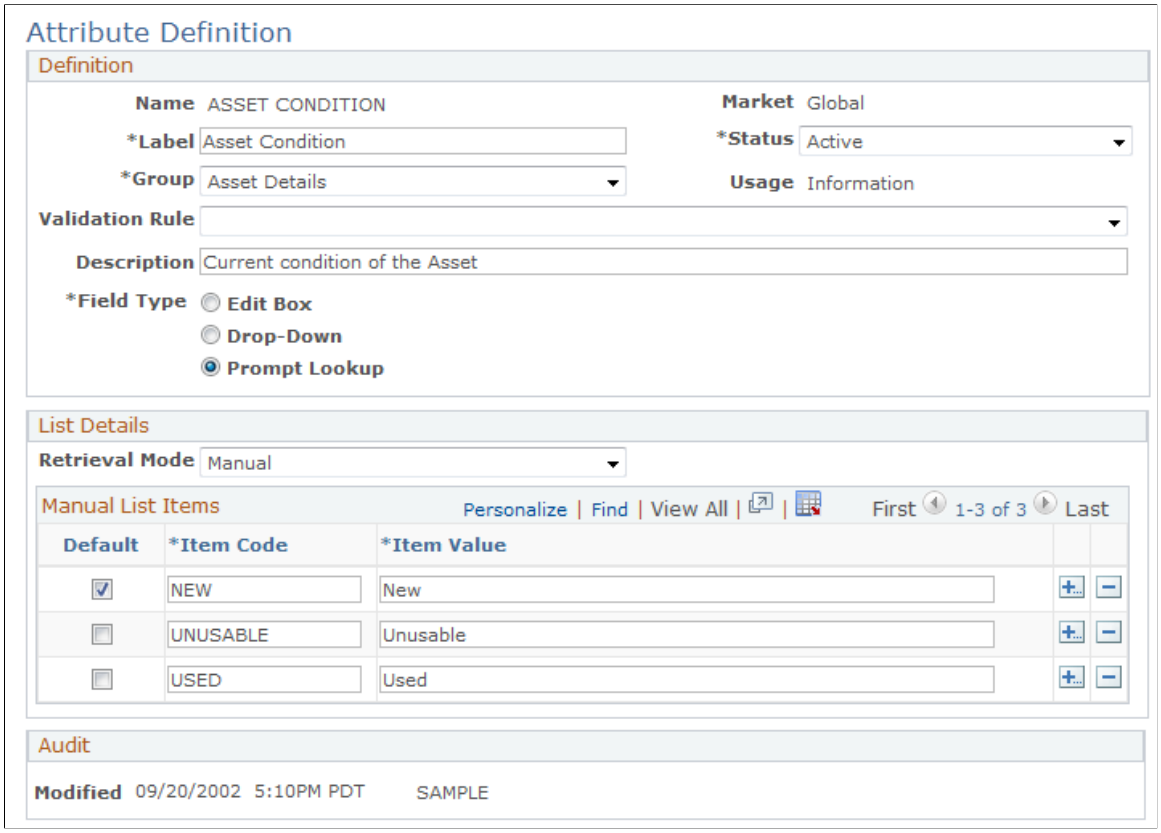
Attribute Definition Page

Use the Attribute Definition page (RB_ATTRIBUTE_MAIN) to define a product attribute.

Navigation:

Set Up CRM > **Common Definitions** > **Attributes** > **Attribute Definition** > **Attribute Definition**

This example illustrates the fields and controls on the Attribute Definition page.



Warning! Although product attributes provide flexibility for modeling products, attributes can adversely affect runtime performance. We suggest that you not use more than a few attributes per product.

See “Understanding Attributes” (Automation and Configuration Tools).

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Chapter 4

Defining Items

Understanding Item Definition in PeopleSoft CRM

An item must be available in PeopleSoft CRM system tables before you can reference it on an installed product, define material requirements for a service, use it to complete work on a service order, or create a return material authorization (RMA) enabling a customer to return it.

To define items, use the Item Definition component or use the Item Primary enterprise integration point (EIP) to synchronize PeopleSoft CRM item definition records with item records that you defined in the inventory and purchasing system.

Important! To process material management transactions that take place in PeopleSoft CRM and the inventory and purchasing system, the definition of the item on the transaction must be identical in both systems. If you do not use the Item Primary EIP to keep item information synchronized, you must manually duplicate changes or additions to item records in both systems.

The Item Primary EIP includes three publishing application messages:

- ITEM_CRM_FULLSYNC_EFF
- ITEM_CRM_SYNC_EFF
- ITEM_CRM_SYNC

At initial implementation, the inventory and purchasing system publishes a full set of item records to the PeopleSoft CRM system using the ITEM_CRM_FULLSYNC_EFF application message. When you add or modify item definitions in the inventory and purchasing system after the initial synchronization, each is published to PeopleSoft CRM using the ITEM_CRM_SYNC and ITEM_CRM_SYNC_EFF application messages. PeopleSoft CRM is a subscriber to, not a publisher of, these messages. Any changes that you make to item definitions in PeopleSoft CRM are not published or synchronized with the inventory and purchasing system.

When the messages of the Item Primary EIP are activated, you cannot use the Item Definition component in PeopleSoft CRM to change or add item records. Most updates are made to the item records in the inventory and purchasing system and publish them to PeopleSoft CRM, excluding the Configuration Option section and the **Short Description** field, as shown in this diagram:

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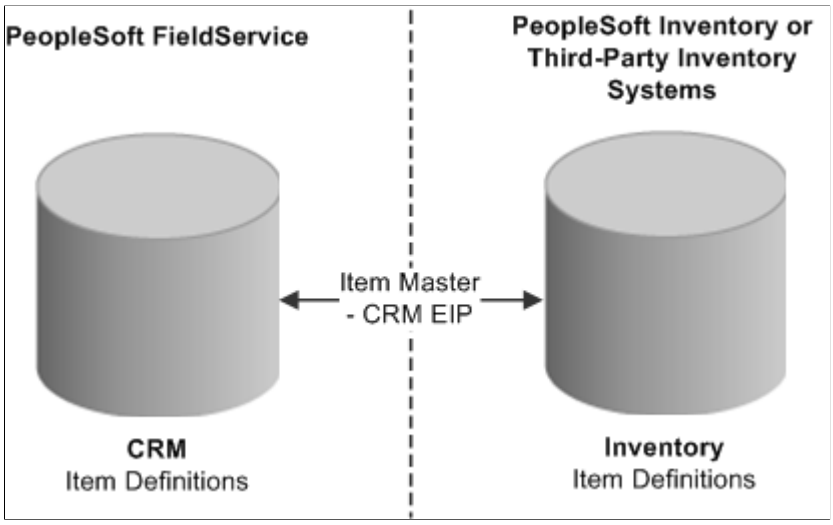
This diagram illustrates the data flow of item records from the inventory system to the CRM system using the Item Primary EIP.



Related Links

Application Fundamentals

Item Status

This table lists the statuses that items can have in PeopleSoft CRM:

Status	*Description*
Under Initialization	The item definition has not been completed. No transactions are permitted, and the system does not list the item in any prompts. **Note:** PeopleSoft Inventory and Purchasing do not publish item definition records for items with an *Under Initialization* status. Only items defined in PeopleSoft CRM using the Item Definition component can have this status.
Pending Approval	The item definition has been completed and is awaiting approval. No transactions are permitted, and the system does not list the item in any prompts. Pending approval items are not sent from inventory until approval occurs.
Denied Approval	The item definition has been denied. No transactions are permitted, and the system does not list the item in any prompts. **Note:** In PeopleSoft CRM, item definition approval processing is a manual business process. PeopleSoft Inventory and Purchasing do not publish item definition records for items with *Pending Approval* or *Denied Approval* status. Only items that are defined in PeopleSoft CRM using the Item Definition component can have these status values.
Active	The item definition is active in the system. Items with an *Active* status are eligible for all item transactions in PeopleSoft CRM.

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Status	*Description*
Hold	The item definition is on hold in the system.
Inactive	The item is no longer active in the system.
Discontinue	Usage of the item is being phased out. **Note:** In PeopleSoft CRM, you can receive and report usage and removal for an item with a *Hold, Inactive,* or *Discontinue* status using the Order Materials and Service Order components in PeopleSoft Integrated FieldService. You can also create an RMA for customers that are returning the item using the RMA Form (return material authorization form) component in PeopleSoft Support. However, you cannot enter a request to order any quantity of the item using the Order Materials component, nor can you create replacement orders for the item using the RMA Form component.

Related Links

"Setting Up the Order Materials Component" (PeopleSoft Integrated FieldService)
"Understanding Material Return Processing" (PeopleSoft Call Center Applications)
Application Fundamentals

Defining Item Control Values

To define item control values, use the Item Number Control (INV_ITEM_CONTROL), Item Groups (INV_ITEM_GROUP), Item Families (INV_PROD_FAMILIES), and Stock Types (INV_STOCK_TYPE) components.

Note: Item control values in PeopleSoft CRM are used only if you synchronize them with PeopleSoft Supply Chain Management (PeopleSoft SCM) applications, including PeopleSoft Inventory and Purchasing. If you synchronize item records with another system, the Item Primary EIP application messages do not update any control value information that is documented in this section.

Pages Used to Define Item Control Values

Page Name	*Definition Name*	*Usage*
Item Number Control Page	ITEM_NBR_CONTROL	Define whether new items are numbered sequentially or manually.
Item Group Page	INV_ITEM_GROUP	Define groups to categorize items. You can use item group as an alternate search key for Item ID.

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Page Name	*Definition Name*	*Usage*
Item Family Page	PROD_FAMILY_INV	Define families to which items can be assigned during the item definition process. You can use item family as an alternate search key for the item ID.
Stock Type Page	INV_STOCK_TYPE	Create ownership information codes for inventory items that are leased or consigned. You must specify stock types for any non-owned items that you define on the Item Definition page.

Item Number Control Page

Use the Item Number Control page (ITEM_NBR_CONTROL) to define whether new items are numbered sequentially or manually.

Navigation:

Items CRM > Item Number Control > Item Number Control

This example illustrates the fields and controls on the Item Number Control page.

Note: The item number controls that you define on this page are used for PeopleSoft CRM purposes only. If you synchronize item records with another system, the Item Primary EIP application messages do not update item number control information.

Field or Control	*Description*
Auto Number Items	Select to enable automatic numbering. When automatic numbering is enabled, you can accept the system-generated *NEXT* value as the ID for each item that you define. Even if automatic numbering is enabled, you can override the *NEXT* value by entering item IDs manually. **Note:** If you do not select this check box, you must enter IDs manually when defining new items on the Item Definition page.

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Field or Control	*Description*
Last Item Number Assigned	Enter the start of the numbering sequence that the system uses to generate unique item IDs automatically. When you select *NEXT* as the item ID during the item definition process, the system assigns the next sequential number in this numbering sequence as the item ID.

Related Links

"Setting Up Automatic Numbering" (Application Fundamentals)

Item Group Page

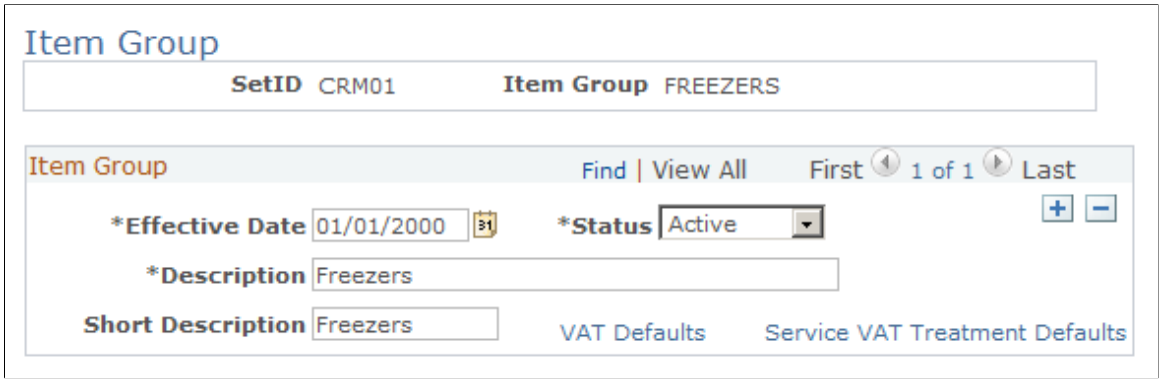
Use the Item Group page (INV_ITEM_GROUP) to define groups to categorize items.

You can use item group as an alternate search key for Item ID.

Navigation:

Items CRM > **Item Groups** > **Item Group**

This example illustrates the fields and controls on the Item Group page.



Use this page to define groups that categorize items in PeopleSoft CRM. The concept of item groups originates from PeopleSoft Inventory. It is used on the Item Definition page for information purposes.

For more information about item groups, refer to the *PeopleSoft FSCM Managing Items* for defining item control values.

Field or Control	*Description*
VAT Defaults	Click to access the VAT Defaults Setup page, which is a common page used to set up value-added tax (VAT) defaulting for all PeopleSoft applications that process VAT transactions. On this page, you can define VAT defaults for bill sources, per VAT registration country and state. Clicking this link transfers you to PeopleSoft Financials, where your must set up your VAT billing.

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Field or Control	*Description*
Service VAT Treatment Defaults	Click to access the Service VAT Treatment Drivers Setup page, which is a common page used to set up VAT services treatment for all PeopleSoft applications that process VAT transactions. If you are required to implement special handling for services, you can specify VAT service treatment defaults for bill sources on this page for a supplier's (seller's) location country and state. VAT defaults are also used when integrating with PeopleSoft Transaction Billing Processor. Clicking this link transfers you to PeopleSoft Financials, where your must set up your VAT billing.

Item Family Page

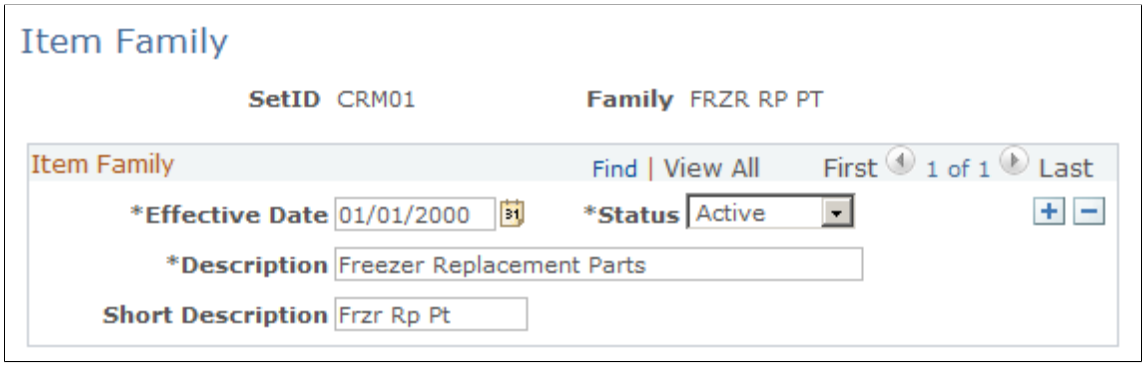
Use the Item Family page (PROD_FAMILY_INV) to define families to which items can be assigned during the item definition process.

You can use item family as an alternate search key for the item ID.

Navigation:

Items CRM > **Item Families** > **Item Family**

This example illustrates the fields and controls on the Item Family page.



Use this page to define families with which items can be associated, besides item groups, during the item definition process in PeopleSoft CRM. Item families are the same as item groups. They are used on the Item Definition page for information purposes. No formal relationship is established between item families and groups, but you can further categorize groups by using families.

For example, you can define a group on *freezers* and create *freezer replacement parts* and *freezer accessories* as families of this group.

Fields on the Item Families and Item Groups pages are identical.

For more information about item families, refer to the *PeopleSoft FSCM Managing Items* for defining item control values.

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Stock Type Page

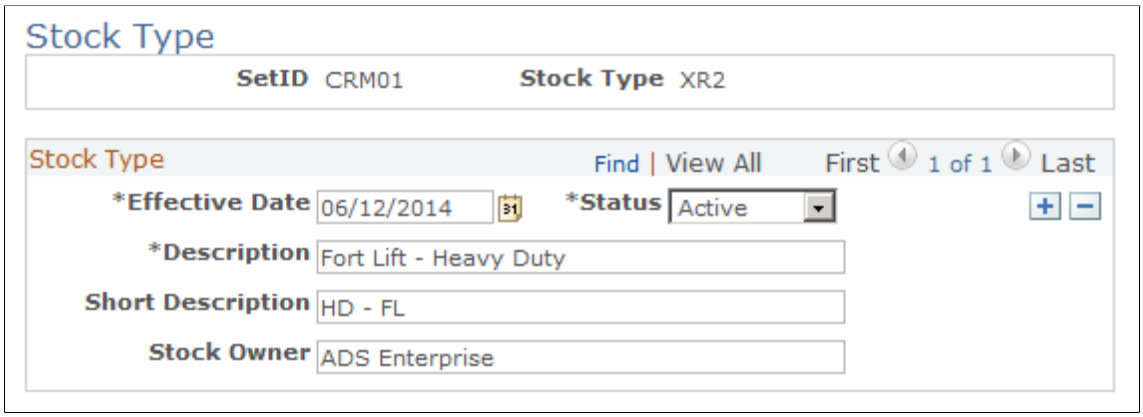
Use the Stock Type page (INV_STOCK_TYPE) to create ownership information codes for inventory items that are leased or consigned.

You must specify stock types for any non-owned items that you define on the Item Definition page.

Navigation:

Items CRM > **Stock Types** > **Stock Type**

This example illustrates the fields and controls on the Stock Type page.



Use this page to create ownership information codes for inventory items that are leased or consigned.

For information about stock types, refer to the *PeopleSoft FSCM Managing Items* for defining item control values.

Defining and Maintaining Items

To define and maintain items, use the Item Definition (RF_ITEM_DEFN) component.

This section discusses how to define items and establish substitute definitions.

If you are synchronizing with another system using the Item Primary EIP, you can view the current definition for an item in PeopleSoft CRM using the Item Definition component under **Items CRM** > **Review Item Definition.**

Pages Used to Define and Maintain Items

Page Name	*Definition Name*	*Usage*
Item Definition Page	RF_ITEM_DEFN	Define inventory items at the setID level.

Page Name	*Definition Name*	*Usage*
Item Substitutes Page	RF_ITEM_SUB	Establish substitution definitions for items. An item substitution definition specifies alternate items that may be used by personnel requesting stock for activities on service orders. View an item's substitution definition from the RMA Form component in PeopleSoft Support and from the Order Materials and Service Order component in PeopleSoft Integrated FieldService.

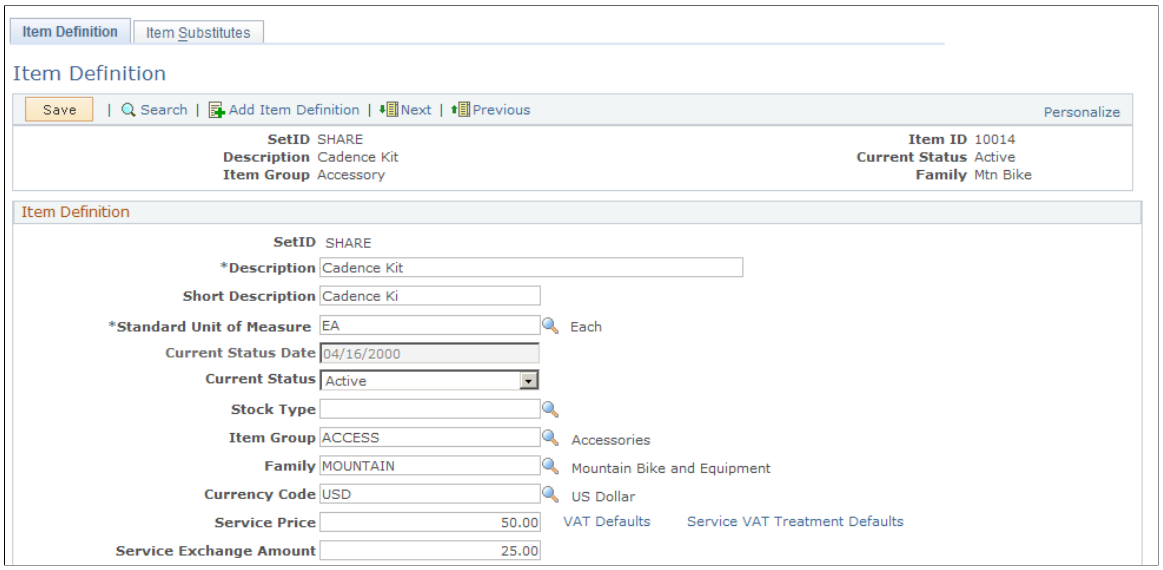
Item Definition Page

Use the Item Definition page (RF_ITEM_DEFN) to define inventory items at the setID level.

Navigation:

- **Items CRM** > **Inventory Item Definition** > **Item Definition**
- **Items CRM** > **Review Item Definition** > **Item Definition**

This example illustrates the fields and controls on the Item Definition page (1 of 2).



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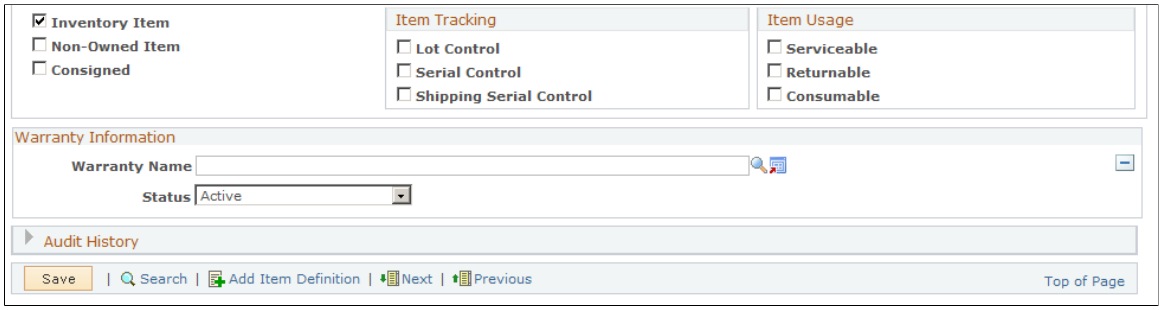
This example illustrates the fields and controls on the Item Definition page (2 of 2).



Item Definition

Field or Control	*Description*
Description and **Short Description**	Enter long and short descriptions. You cannot include embedded single or double quotation marks in the description text. **Note:** The **Short Description** field exists only in CRM, not in PeopleSoft Inventory. This field can be updated even if the item EIPs are active.
Standard Unit of Measure	Enter the base UOM for the item that reflects the smallest transactable UOM for the item. Establish UOMs on the Units of Measure page under **Set Up CRM** > **Common Definitions.** ***Warning!*** To minimize rounding discrepancies when using multiple UOMs, the standard UOM must be the smallest valid UOM for the item. Also, set up the standard UOM as a whole number.
Current Status Date	Displays the date on which the current status of the item definition was updated.
Stock Type	Enter the owner of the stock if the item is non-owned. First, you must establish stock types on the Stock Types page.
Item Group	Enter a group ID to categorize the item as an alternate search key. Establish item groups on the Item Groups page.
Family	Enter a family ID to categorize the item as an alternate search key. Establish item families on the Item Families page.

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Field or Control	*Description*
Currency Code	Enter the currency code used for the item.
Service Price	Enter the price for the service item being defined. **Note:** This price is picked up for billing the customer when integrating with PeopleSoft Transaction Billing Processor for any materials that were used to service the customer.
Service Exchange Amount	Enter the amount the customer will be credited if the old item is exchanged for the new one. **Note:** This price is used to credit the customer when performing a service order and removing material when integrating with PeopleSoft Transaction Billing Processor.
VAT Defaults (value added tax defaults)	Click to access the VAT Defaults Setup page, which is a common page used to set up VAT defaulting for all PeopleSoft applications that process VAT transactions. On this page, you can define VAT defaults for bill sources, per VAT registration country and state. Clicking this link transfers you to PeopleSoft Financials, where your must set up your VAT billing.
Service VAT Treatment Defaults	Click to access the Service VAT Treatment Drivers Setup page, which is a common page used to set up VAT services treatment for all PeopleSoft applications that process VAT transactions. If you are required to implement special handling for services, you can specify VAT service treatment defaults for bill sources on this page for a supplier's (seller's) location country and state. Clicking this link transfers you to PeopleSoft Financials, where your must set up your VAT billing.

Item Type

Field or Control	*Description*
Inventory Item	Select if the item is physically stocked in inventory. You cannot create transactions in PeopleSoft Inventory for noninventory items.

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Field or Control	*Description*
Non-Owned Item	Select if the item is non-owned. PeopleSoft Inventory does not create accounting entries for non-owned item transactions. If you define an item as non-owned, you must also specify a stock type.
Consigned	Select if the item is consigned. Only non-owned items can be consigned.

Note: After an order for the item is initiated from the RMA component or the Order Materials component, the system does not enable values in the **Item Type** group box to be modified.

Item Tracking

Field or Control	*Description*
Lot Control	Select if the item is tracked by lot ID. In PeopleSoft Integrated FieldService, you must enter the lot ID for transactions of lot-controlled items that are initiated on the Order Materials page and when defining installed product records for lot-controlled items on the Installed Product and Services component. You also specify the lot ID on the Time Material Expense page on the service order. In PeopleSoft Support, you may enter the lot ID for advanced exchange RMA transactions of lot-controlled items; however, it is not required. In PeopleSoft Inventory, you must enter the lot ID at the time of receipt and putaway and for all inventory movement transactions of lot-controlled items.

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Field or Control	*Description*
Serial Control	Select to track each unit of the item in stock by a unique identifier. Serial-controlled inventory items are managed in units of one, based on the item's standard UOM. In PeopleSoft Integrated FieldService, you must enter the serial ID for transactions of serial-controlled items that are initiated on the Order Materials page and when defining installed product records for serial-controlled items on the Installed Product page. You also specify the serial ID on the Time Material Expense page on the service order. In PeopleSoft Support, you must enter the serial ID for advanced return RMA transactions of serial-controlled items. In PeopleSoft Inventory, you must enter the serial ID at the time of receipt and putaway and for all inventory movement transactions of serial-controlled items.
Shipping Serial Control	Select to assign a unique identifier to each unit of the item if serial tracking is required only at the time of shipment. Until ship-serial-controlled items are shipped, you can move them to different stock locations within the PeopleSoft Inventory business unit without serial control, which simplifies transaction processing and entry. Serial numbers are then assigned at the time of shipment to provide tracking on products shipped to customers, internal locations, and other PeopleSoft Inventory business units. When a user records the quantity received, used, not used, and removed for a ship-serial-controlled item on the Order Materials page in PeopleSoft CRM, you must enter the ship-serial ID. The system uses this ID to accurately update the customer's installed product record. **Note:** You can also report on materials used and removed on the Time Material and Expense page.

Note: After an order for the item is initiated from the RMA Form component or the Order Materials component, the system does not enable values in the **Item Tracking** group box to be modified.

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Item Usage

Field or Control	*Description*
Serviceable	Select if a service can be performed on the item. You create services and service orders only for items that are serviceable. You specify products and installed products on the service order and items when you are ordering, receiving, using and removing materials. **Note:** You should create services and service orders only for items that are serviceable.
Returnable	Select if the item can be returned. This data is for informational purposes only. The removal of a nonreturnable item on the Time Material Expense page on the service order does not trigger any inventory adjustment transactions. The system issues a warning if you try to return an item that is not identified as returnable using the RMA Form component. You can select to cancel or proceed with the transaction.
Consumable	Select if the item can be scrapped rather than returned. When the removal of a consumable item is recorded on the service order component, the system does not trigger any inventory adjustment transactions. However, the system updates the customer's installed product record to reflect the removal of the installed item.

Note: In the RMA Form, Service Order and Order Materials components, you can select items regardless of the *Serviceable, Returnable,* and *Consumable* check box settings.

Product Options

When you create a new item or select an item with a current status of *Under Initialization,* the system displays the **Product Options** group box to establish whether a corresponding product definition should be created simultaneously with the item definition.

Field or Control	*Description*
Create Product	Select to create a corresponding product definition for this item.
Use Item ID	Select to make the product ID the same as the item ID. If selected, the **Product ID** field becomes unavailable for entry.

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Field or Control	*Description*
Product ID	Enter the ID for the product definition. If you set up automatic numbering for products, enter a value of *NEXT* to use the next available product ID.
Product Type	Enter the type of product. Delivered types include *Engagement Service, Package Product,* and *Standard Product.*

Warranty Information

Field or Control	*Description*
Warranty Name	Enter the warranty that is associated with the item. Establish warranties on the Warranty page.
Status	Select the current status of the warranty. Values are *Active* and *Inactive.* **Note:** An item can have only one active warranty associated with it.

See Also *PeopleSoft FSCM Inventory*.

Related Links

Understanding Item Definition in PeopleSoft CRM
"Understanding Agreements and Warranties" (Application Fundamentals)
"Understanding Material Return Processing" (PeopleSoft Call Center Applications)
"Setting Up the Order Materials Component" (PeopleSoft Integrated FieldService)
Understanding Installed Products
"Understanding the Service Data Model" (PeopleSoft Integrated FieldService)
"Understanding Service Orders" (PeopleSoft Integrated FieldService)

Item Substitutes Page

Use the Item Substitutes page (RF_ITEM_SUB) to establish substitution definitions for items.

An item substitution definition specifies alternate items that may be used by personnel requesting stock for activities on service orders. View an item's substitution definition from the RMA Form component in PeopleSoft Support and from the Order Materials and Service Order component in PeopleSoft Integrated FieldService.

Navigation:

- **Items CRM** > **Inventory Item Definition** > **Item Substitutes**

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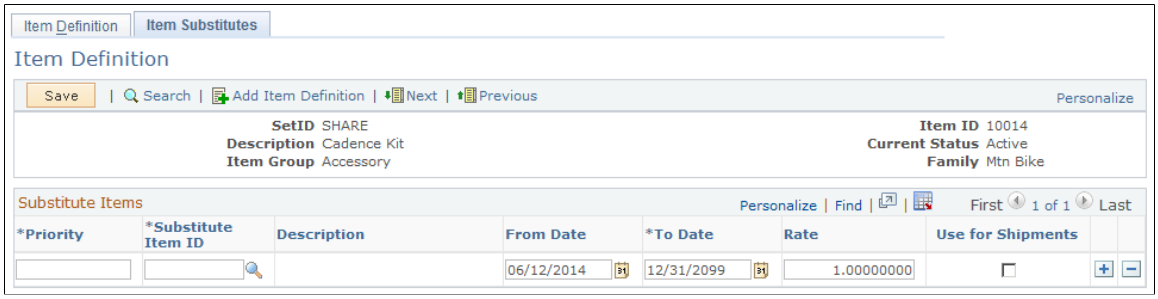
- **Items CRM > Review Item Definition > Item Substitutes**

This example illustrates the fields and controls on the Item Substitutes page.



Substitute Items

Field or Control	*Description*
Priority	Enter a priority value for each substitute item that you add. The substitute item with the highest priority (the lowest number) should be the first choice when substitutions are made. Though priority does not need to be sequential, it must be greater than *0*.
From Date	Enter the date on which the substitute item becomes a valid substitution option. The default is the current date.
To Date	Enter the date on which the substitute item is no longer a valid substitution option. The default is December 31, 2099.
Rate	Enter the quantity of the substitute item that is required to replace the original item. The default conversion rate is *1*. Conversion rates are calculated using the item's standard UOM.
Use for Shipments	Select if the substitute item is valid for material stock requests during the picking process in your inventory system.

Related Links

"Setting Up the Order Materials Component" (PeopleSoft Integrated FieldService)
"Understanding Material Return Processing" (PeopleSoft Call Center Applications)

Associating Items with Additional UOMs

To associate items with additional UOMs, use the Unit of Measure (INV_ITEM_UOM) component.

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You can define additional UOMs for item transactions. For example, suppose that you order an item by the case but ship it in individual units, you need two additional UOMs: a shipping UOM (each), and an ordering UOM (case). When multiple UOMs apply to a given item, PeopleSoft maintains conversion rates to facilitate processing.

This section discusses how to add UOMs.

Note: When you define an item in the Item Definition component in PeopleSoft CRM, the system automatically inserts a row into the Units of Measure table with the standard UOM set up as a valid ordering, stocking, and shipping UOM.

Page Used to Associate Items with Additional UOMs

Page Name	*Definition Name*	*Usage*
Unit of Measure Page	INV_ITEM_UOM	Add UOMs to an item.

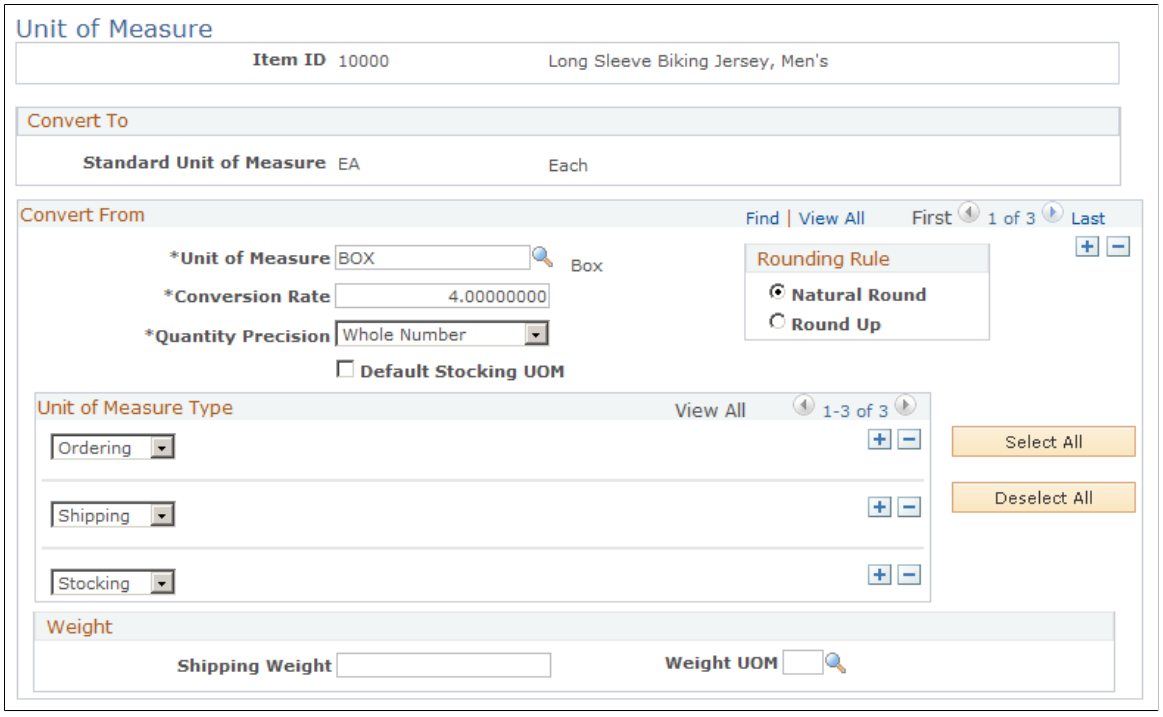
Unit of Measure Page

Use the Unit of Measure page (INV_ITEM_UOM) to add UOMs to an item.

Navigation:

Items CRM > **Units of Measure** > **Unit of Measure**

This example illustrates the fields and controls on the Unit of Measure page.



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In PeopleSoft Order Capture, the system prompts for product UOMs that are defined as valid ordering UOMs. In PeopleSoft Integrated FieldService and Support, all item transactions are performed using the item's standard UOM.

This page appears as read-only if the unit of measure information is set to be populated automatically by a synchronization process. It is available for edit only when the unit of measure information is not synchronized.

Convert To

This group box displays the standard UOM that you defined for this item on the Item Definition page.

Convert From

Field or Control	*Description*
Unit of Measure	Enter a UOM that is also used for transactions involving this item. You establish UOMs under **Set Up CRM** > **Common Definitions** > **Unit of Measure** > **Unit of Measure.** **Note:** In PeopleSoft Integrated FieldService, the system uses the item's standard UOM for all item transactions initiated from the Order Materials and Service Order component. Similarly, in PeopleSoft Support, the system uses the item's standard UOM only for RMA and replacement transactions initiated from the RMA Form component.
Conversion Rate	Enter the conversion rate between the standard UOM (in the **Convert To** group box) and the UOM (in the **Convert From** group box). If you specified the conversion rate between these two UOMs under **Set Up CRM** > **Common Definitions** > **Unit of Measure** > **Unit of Measure**, the CRM system populates the value automatically when you specify the UOM (in the **Convert From** group box). To determine the conversion rate to enter, consider the relationship between the standard UOM and this new UOM. For example, suppose that the standard UOM for the item is EA (each) and this newly added UOM is CS (case), and one CS of the item contains 5 EA items. You would enter *5* as the conversion rate. The value's format is updated after you save the record.
Quantity Precision	Select how calculated or user-entered quantities should be presented in the system, as decimal (up to four decimal places) or whole number. This field applies to PeopleSoft SCM.

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Field or Control	*Description*
Default Stocking UOM	Select if this UOM is the default stocking UOM. This field applies only to PeopleSoft SCM. When you assign UOMs to an item on the Unit of Measure page, you indicate whether each UOM is valid for ordering, shipping, or stocking transactions. If more than one UOM is valid for stocking, specify which of these should be the default stocking UOM.

Rounding Rule

These fields apply only to PeopleSoft SCM.

Unit of Measure Type

Select the kinds of transactions that use the selected UOM. You must select at least one UOM type for each item.

Field or Control	*Description*
Ordering	Select if the UOM is used for stock requests or for express issue transactions in PeopleSoft Inventory. Order Management also uses the ordering UOM. In Order Capture, the system prompts for product UOMs that are defined as valid ordering UOMs.
Shipping	Select if the UOM is used for shipping and issues transactions in PeopleSoft Inventory.
Stocking	Select if the UOM is used for putaway or receiving transactions in PeopleSoft Inventory. You can also use this UOM for numerous other transactions in PeopleSoft Inventory, including transfers, container management, adjustments, picking, and physical accounting.
Select All and **Deselect All**	When you first define an item-UOM combination, only one field appears in the **Unit of Measure Type** group box. If the selected UOM is valid for all transactions involving this item, click the **Select All** button. If the selected UOM is no longer valid for a given transaction, click the **Deselect All** button to clear the UOM type fields, then insert valid transactions.

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To associate the item with additional units of measure, add rows using the **Add a new row** button to the right of the **Unit of Measure Type** group box.

Weight

PeopleSoft Order Capture uses the **Shipping Weight** and **Weight UOM** fields to calculate shipping costs when it is integrated with a third-party freight calculator software (for example, ConnectShip).

See Also

PeopleSoft FSCM Managing Items

Related Links

Understanding Products in PeopleSoft CRM

Associating Items with Additional UOMs

"Setting Up the Order Materials Component" (PeopleSoft Integrated FieldService)

"Understanding Material Return Processing" (PeopleSoft Call Center Applications)

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Chapter 5

Working with Item Assemblies

Understanding Item Assemblies

Item service assemblies identify the components of an item that an organization can service or support. Once defined, technicians or call center agents can use the Review Assemblies component to reference the service assembly definition and help drive troubleshooting and service activities.

For every item within a setID in the system, you can define serviceable component items. You can also define service assemblies for a component item, creating service assemblies with multiple levels. Before you can define a service assembly, however, you must define the item and all of its component items.

For each assembly within a setID, you can define multiple versions using assembly codes. For example, suppose that you have a radio that is sold and serviced in the U.S. and Great Britain. You can define two assembly codes to reflect the radio's different power supply components.

In addition to identifying serviceable components for an item, technicians and call center agents can use service assemblies to check for manufacturers' warranties on the component parts of an item that is installed at the customer's site. In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can activate warranties that you offer for installed products; however, this warranty information is for the end item itself on the installed product record, not for any component items. You can check for warranties that you offer for the component item on the Review Assemblies - Components page.

Related Links

Understanding Item Definition in PeopleSoft CRM

“Understanding Agreements and Warranties” (Application Fundamentals)

Defining Item Assemblies

To define assembly items, use the Assemblies Maintenance (BOM_MAINTENANCE) component.

Pages Used to Define Item Assemblies

Page Name	*Definition Name*	*Usage*
Assemblies - Summary Page	EN_BOM_MAINT	Define and maintain the serviceable components for a given combination of setID and item.
Assemblies - Assembly Page	EN_BOM_TEXT	Describe the service assembly and record any applicable notes.

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Page Name	*Definition Name*	*Usage*
Assemblies - Components Page	EN_COMP_MAINT	View or modify details about each assembly component.
Assemblies - Component Notes Page	EN_COMP_TEXT	View or record notes that relate to a specific component on a service assembly.

Common Elements Used in Defining Item Assemblies

Field or Control	*Description*
Op Seq (operation sequence)	Enter the sequence in which the component is assembled. This value is informational in PeopleSoft CRM. Operation sequence is used primarily in PeopleSoft Manufacturing environments.
Quantity and **Per**	Enter the quantity of the component that is required for each assembly or order of the end item, in the standard unit of measure (UOM) of the end item. The quantity is used primarily in PeopleSoft Manufacturing environments.

Assemblies - Summary Page

Use the Assemblies - Summary page (EN_BOM_MAINT) to define and maintain the serviceable components for a given combination of setID and item.

Navigation:

Items CRM > **Assemblies** > **Summary**

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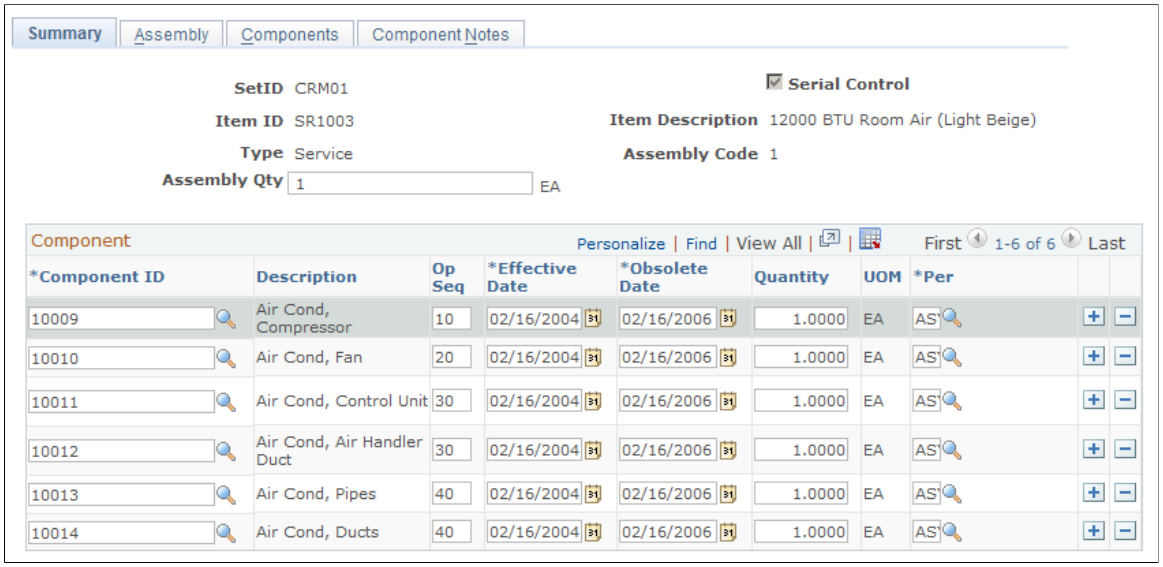
This example illustrates the fields and controls on the Assemblies - Summary page.



Field or Control	*Description*
Assembly Qty (assembly quantity)	Enter the end item quantity in the standard UOM of the item as you defined it on the Item Definition page. In general, set the assembly quantity to *1* and enter the component quantity that is included in one unit of the end item. However, if you typically install and service the end item in quantities greater than one, you might define a service assembly in terms of the normal installation and service quantity. For example, a manufacturer and distributor of speakers might produce and stock speakers in inventory as single units. Yet because a customer always buys at least two speakers at a time, the speaker company might choose to set up a service assembly with an assembly quantity of two.
Component ID	Select a service assembly component. You must establish the component as an active item using the Item Definition page or the Item Primary enterprise integration point. In addition, the component item must conform to these restrictions: • The component item cannot be the same as the end item. • The effectivity period, which the effective and obsolete dates specify for the component, cannot overlap with other rows for the same component ID.

See Also

PeopleSoft FSCM Manufacturing, “Bills of Material”

Related Links

Understanding Item Definition in PeopleSoft CRM

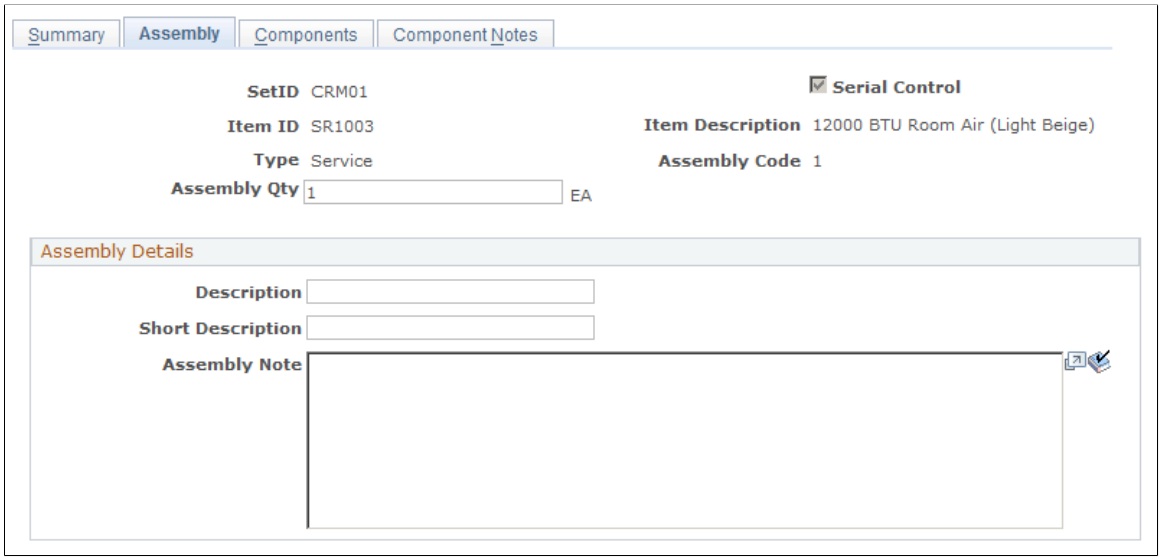
Assemblies - Assembly Page

Use the Assemblies - Assembly page (EN_BOM_TEXT) to describe the service assembly and record any applicable notes.

Navigation:

Items CRM > **Assemblies** > **Assembly**

This example illustrates the fields and controls on the Assemblies - Assembly page.



Use the **Assembly Details** section of this page to describe any appropriate details of the assembly and any notes that may apply.

Assemblies - Components Page

Use the Assemblies - Components page (EN_COMP_MAINT) to view or modify details about each assembly component.

Navigation:

Items CRM > **Assemblies** > **Components**

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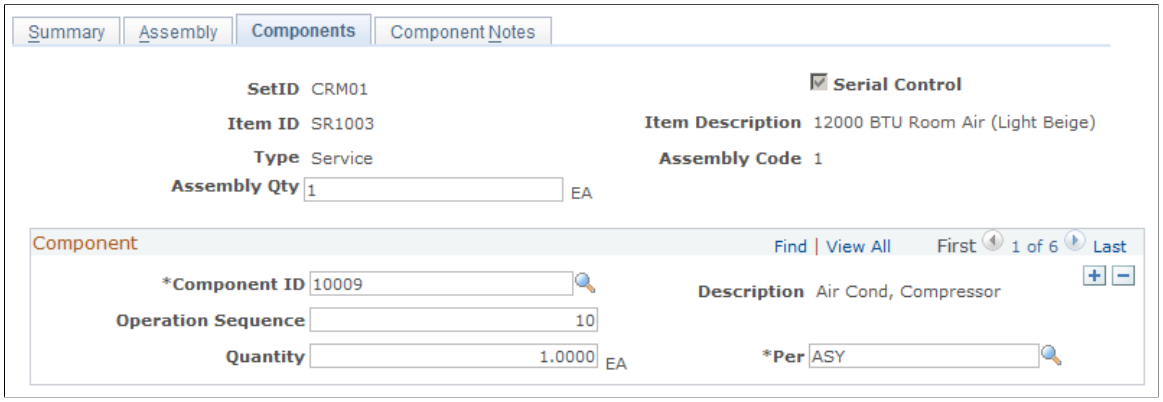
This example illustrates the fields and controls on the Assemblies - Components page.



Field or Control	*Description*
Component ID	Select a service assembly component. The system automatically populates the description of the component item.

See Also

PeopleSoft FSCM Manufacturing, “Bills of Material”

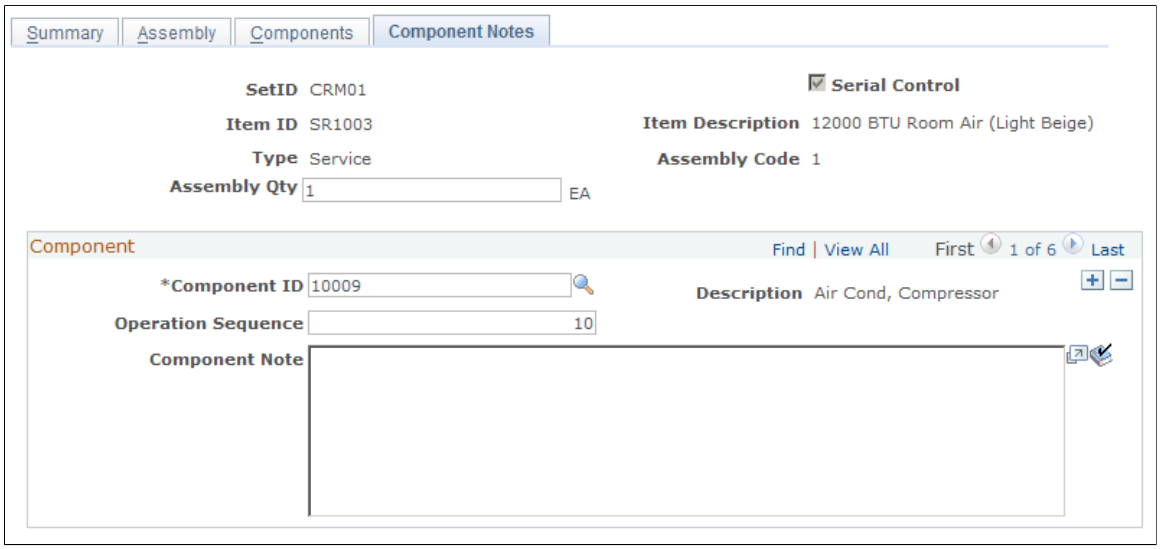
Assemblies - Component Notes Page

Use the Assemblies - Component Notes page (EN_COMP_TEXT) to view or record notes that relate to a specific component on a service assembly.

Navigation:

Items CRM > **Assemblies** > **Component Notes**

This example illustrates the fields and controls on the Assemblies - Component Notes page.



If a manufacturer or another third party offers a warranty on a component item, you can note it on this page.

Viewing Assembly Information

To view assembly information, use the Assemblies Inquiry (BOMINQUIRY) component.

Pages Used to View Assembly Information

Page Name	*Definition Name*	*Usage*
Review Assemblies - Summary Page	EN_BOM_INQUIRY	View the serviceable components that are defined for a given combination of setID and item.
Review Assemblies - Assembly Page	EN_BOM_INQ_HEADER	View a description of the service assembly and any recorded notes.
Review Assemblies - Components Page	EN_BOM_INQUIRY_D	View details about each component in the assembly.
Review Assemblies - Component Notes Page	EN_BOM_INQ_D_TXT	View notes that are related to a specific component of a service assembly.

Common Elements Used in Viewing Assembly Information

Field or Control	*Description*
Quantity and **Per**	Displays the quantity of the component that is required for each assembly or order of the end item, in the standard UOM of the end item.

Review Assemblies - Summary Page

Use the Review Assemblies - Summary page (EN_BOM_INQUIRY) to view the serviceable components that are defined for a given combination of setID and item.

Navigation:

Items CRM > **Review Assemblies** > **Summary**

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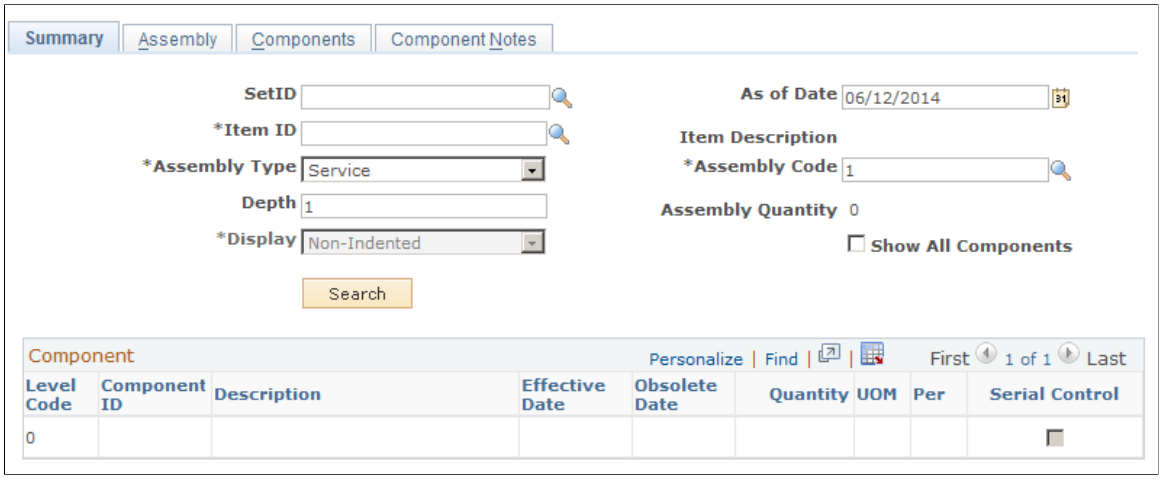
This example illustrates the fields and controls on the Review Assemblies - Summary page.



Enter search criteria for the service assembly that you want to view.

Field or Control	*Description*
SetID	Enter the setID of the service assembly. The system populates this value with the default setID that is associated with your user ID on the User Preferences - Overall Preferences page, if applicable.
As of Date	Enter the effective date of the service assembly. If you choose not to show all components, the system displays only the components that are defined for the service assembly that is in effect for this date.
Item ID	Enter the end item for which a service assembly has been defined.
Assembly Type	Select *Service.* Although other assembly types are available, only *Service* is applicable for PeopleSoft CRM applications.
Assembly Code	Enter the version of the service assembly that is defined for the setID and item combination. Assembly codes can range from 1 to 99.
Depth	Enter the component level of the service assembly. To view all levels, enter *99.*

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Field or Control	*Description*
Display	Select the formatting method to display the service assemblies. Values are: *Indented:* Select to display the service assembly components with each level indented relative to the previous level. If you select a depth greater than 1, the system automatically sets this value. *Non-Indented:* Select to display the service assembly components as a simple list without indentation.
Show All Components	Select to view all components that are defined for a service assembly regardless of the effective date.
Level Code	Displays the level of the component on the service assembly.
Component ID	Displays the item ID of each component. Click the item ID to access the Review Assemblies - Components page and view details, including warranty information, about the component item.

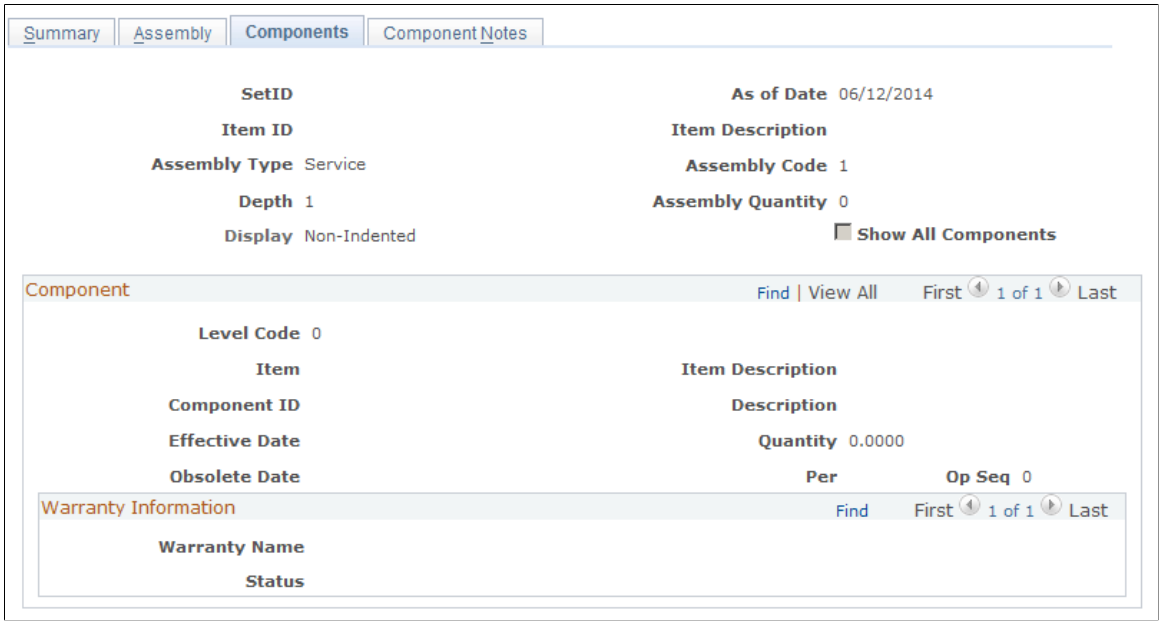
Review Assemblies - Components Page

Use the Review Assemblies - Components page (EN_BOM_INQUIRY_D) to view details about each component in the assembly.

Navigation:

Items CRM > **Review Assemblies** > **Components**

This example illustrates the fields and controls on the Review Assemblies - Components page.



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Component

Field or Control	*Description*
Level Code	Displays the level in the service assembly at which the component item is defined.
Item	Displays the item ID and description.
Op Seq (operation sequence)	Displays the sequence in which the component appears in the assembly structure.

Warranty Information

This section displays the warranty that you establish for the component item on the Item Definition page, if applicable.

Related Links

Understanding Item Definition in PeopleSoft CRM

"Understanding Agreements and Warranties" (Application Fundamentals)

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Chapter 6

Checking Item Balances and Availability

Understanding Balance Inquiries

This section discusses:

- Item availability inquiries.
- Item balance inquiries by business units.
- Item balance inquiries by group members.

Item Availability Inquiries

If you integrate PeopleSoft Customer Relationship Management (PeopleSoft CRM) with PeopleSoft Inventory and you are accessing system pages through the portal using the single sign-on feature, links to the Item/Product Availability component in Inventory are available from the Order Materials and Service Order components in PeopleSoft Integrated FieldService and the Return Material Authorization component in PeopleSoft Support. With the Item/Product Availability component, you can confirm the current available quantity for an item, check cumulative available-to-promise quantity for future dates, and view future supply and demand information for the item.

To inquire item availability from the Return Material Authorization component for an advanced exchange return material authorization (RMA):

1. Click the **View Related Links** button in the **Replacement Item(s)** grid on the Return Material Authorization page.
2. Click the **Item Availability** link on the transfer page.

To inquire about item availability within PeopleSoft Integrated FieldService, click the **Check Availability** link adjacent to the Quantity in Truck on the Order Materials page and then click the **Item Availability** link on the transfer page.

You can also check availability from the Required Material page within a service order in PeopleSoft Integrated FieldService. Click the **Check Availability** link next to the Quantity in Truck then click the **Item Availability** link on the transfer page.

See Also

PeopleSoft FSCM Inventory

Related Links

"Setting Up the Order Materials Component" (PeopleSoft Integrated FieldService)
"Understanding Material Return Processing" (PeopleSoft Call Center Applications)

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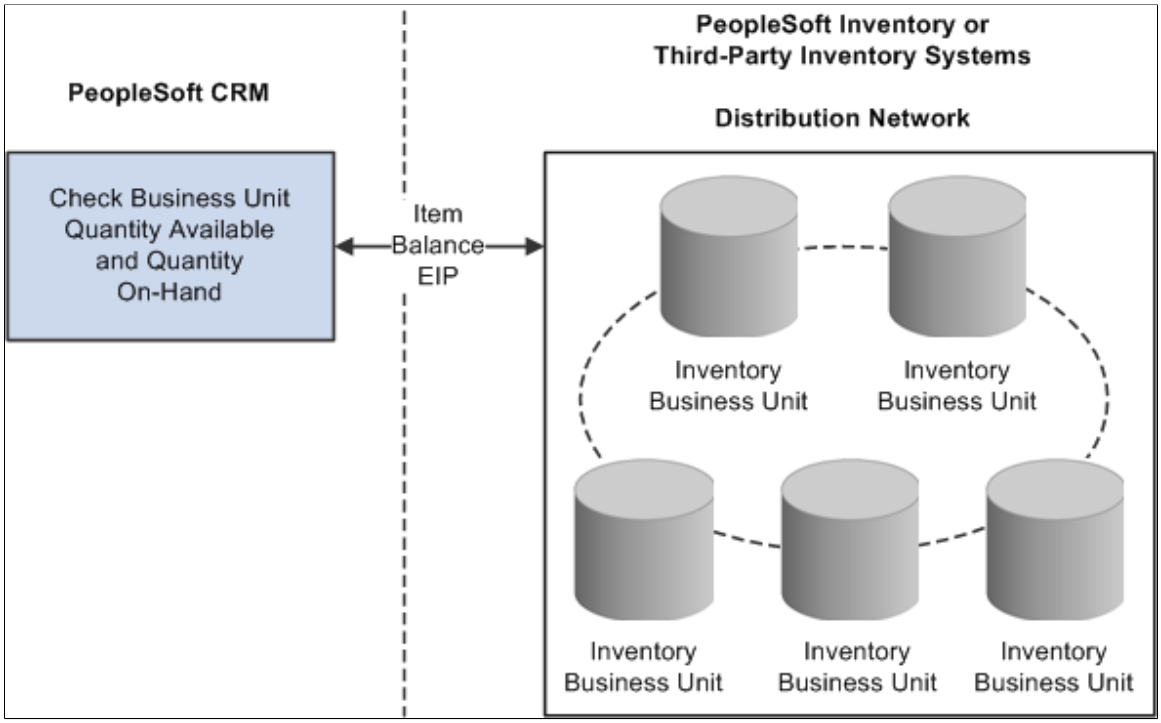
Item Balance Inquiries by Business Units

PeopleSoft CRM uses the Item Balance enterprise integration point (EIP) to retrieve quantity available and on-hand balance information in real-time from the inventory business units that are included in the distribution network that is defined for customer support or field service operations. The sequence of business units reflects their order in the distribution network.

Note: When integrating with PeopleSoft Purchasing and Inventory, you define a distribution network of inventory business units for each business unit in PeopleSoft CRM that can request material for service orders or as replacements or exchanges for material returns.

This diagram illustrates the integration between PeopleSoft CRM and your inventory and procurement system that supports checking quantity that is available and on hand in the inventory distribution network:

This diagram illustrates the data flow item quantity information from the inventory system to the CRM system using the Item Balance EIP.



Related Links

Application Fundamentals

Item Balance Inquiries by Group Members

In PeopleSoft Integrated FieldService, you can check item balances for the good truck stock storage locations that are associated with each group member in a provider group. You can use this balance information to select a group member to assign to a service order activity and to decide how much, if any, material must be ordered to complete the work on the service order activity.

PeopleSoft CRM uses the Item Balance EIP to retrieve balance information in real-time for the good truck stock storage locations that are associated with each member of the assigned provider group from

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PeopleSoft Inventory or a third-party inventory system. The balance information appears on the Item Balance by Group Member page in PeopleSoft CRM.

The system retrieves balance information only for group members who are associated with storage locations on the Storage Location page of the Worker component. This sequence of rules governs which group members' storage location balances the system retrieves:

1. If one or more group members are assigned to the service order activity, the system retrieves balance information for the group members that are assigned to the line.
2. If no group member is assigned to the service order activity but a provider group is specified, the system retrieves the balance information for all group members that are associated with the provider group on that activity.
3. If no group member or provider group is assigned at the activity level, the system displays an error message.

Related Links

"Truck Stock Storage Locations" (PeopleSoft Integrated FieldService)

"Setting Up the Order Materials Component" (PeopleSoft Integrated FieldService)

Viewing Balance Information

To view balance information, use the Order Materials (RF_MATERIAL_ORDERS) component and the Service Order (RF_SERVICE_ORDER) component.

Pages Used to View Balance Information

Page Name	*Definition Name*	*Usage*
Item Balance by Business Units Page	RF_STOR_LOC_RST	Check item balances for the inventory business units that are included in the distribution network that you define for customer support or field service operations.
Item Balance by Group Members Page	RF_STOR_LOC_RST	Check item balances for group members of the assigned provider group.
Return Message from Inventory Page	RF_ITM_BAL_MSG1 RF_ITM_BAL_MSG2 RF_ITM_BAL_MSG3	View messages about problems that the PeopleSoft CRM system encountered when it attempted to retrieve item balance information from the inventory system with the Item Balance EIP.

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Common Elements Used in Viewing Balance Information

Field or Control	*Description*
	The **Message Log** button indicates that the system recorded in the Message Log an error that the Item Balance EIP encountered. Click the button to view the message on an Item Balance Message page.

Item Balance by Business Units Page

Use the Item Balance by Business Units page (RF_STOR_LOC_RST) to check item balances for the inventory business units that are included in the distribution network that you define for customer support or field service operations.

Navigation:

- From the Return Material Authorization page in PeopleSoft Support (select Support, Returns), click the **View Related Links** button following the **Replacement Item ID** field and then click the **Item Balance** link on the transfer page.
- From the Required Material page within the service order in PeopleSoft Integrated FieldService, click the **Check Availability** link next to the **Quantity in Truck** field and then click the **Item Balance by Business Units** link on the transfer page.
- From the Order Materials page, click the **Check Availability** link next to the **Quantity in Truck** field and then click the **Item Balance by Business Units** link on the transfer page.

Note: This page is available only if you have implemented the Item Balance EIP to retrieve quantity balance information from PeopleSoft Inventory or a third-party inventory system.

Field or Control	*Description*
	Click to access the Return Message from Inventory page.
IN Unit (inventory business unit)	Displays the inventory business unit in the distribution network that is associated with support or field service activities. The sequence of the business units reflects their order in the distribution network.
Quantity Available	Displays a subset of the quantity on hand, which reflects the total item quantity that you can use to fulfill demand.

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Field or Control	*Description*
Quantity On Hand	Displays, in the total item quantity in a particular business unit, regardless of the stock's inventory status and storage location. The field value includes both the item quantity available and the quantity reserved. **Note:** This total does not reflect the total item quantity that you can use to fulfill demand.
Quantity Owned	Displays, in the item's standard unit of measure, the amount of the item that the inventory business unit owns.

Depending on from where you navigated, these links can appear at the bottom of the page: **Return to RMA, Service Order,** and **Order Materials.** Click a link to return to the corresponding component.

Item Balance by Group Members Page

Use the Item Balance by Group Members page (RF_STOR_LOC_RST) to check item balances for group members of the assigned provider group.

Navigation:

- From the Required Material page within the service order in PeopleSoft Integrated FieldService, click the **Check Availability** link next to the **Quantity in Truck** field and then click the **Item Balance by Group Members** link on the transfer page.
- From the Order Materials page, click the **Check Availability** link next to the **Quantity in Truck** field and then click the **Item Balance by Group Members** link on the transfer page.

Note: This page is available only if you have implemented the Item Balance EIP to retrieve quantity balance information from PeopleSoft Inventory or a third-party inventory system.

Field or Control	*Description*
	Click the **Message Log** button to access the Return Message from Inventory page.
Provider Group Name	Displays the name of the provider group that is assigned to the service order activity.
Group Member Name	Displays the name of the group member that is assigned to the service order activity.
IN Unit (inventory business unit)	Identifies the inventory business unit where the group member's truck stock storage locations are defined.

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Field or Control	*Description*
Quantity Available	Displays the amount of the item that is available to fulfill orders in the group member's good truck stock storage location.
Area, Level 1, Level 2, Level 3, and **Level 4**	Displays the material storage area in PeopleSoft Inventory or the third-party inventory system that corresponds to the worker's good storage location. You can define a storage location definition in an inventory system using a storage area and up to four levels representing a physical subdivision of the storage area, such as aisles, rows, shelves, and bins.

Related Links

"Truck Stock Storage Locations" (PeopleSoft Integrated FieldService)

Return Message from Inventory Page

Use the Return Message from Inventory page (RF_ITM_BAL_MSG1) to view messages about problems that the PeopleSoft CRM system encountered when it attempted to retrieve item balance information from the inventory system with the Item Balance EIP.

Navigation:

Click the **Message Log** button on the Item Balance by Business Units page or the Item Balance by Group Members page.

Note: This page is available only if problems occur while retrieving balance information with the Item Balance EIP.

The **Message Node** (for Item Balance by Business Units) or **Storage Area Message** (for Item Balance by Group Members) group box displays information about errors with the Item Balance EIP process.

The return message is the message catalog number.

Typically, business unit errors indicate that the business unit has not been defined or the business unit-item combination is invalid in the inventory system. Storage area errors typically indicate that the storage location for the technician's truck stock has not been defined or the storage location-item combination is invalid in the inventory system.

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Chapter 7

Setting Up Products

Understanding Products in PeopleSoft CRM

This section discusses:

- Product definitions in PeopleSoft CRM.
- Integrations with PeopleSoft Supply Chain Management (PeopleSoft SCM) and PeopleSoft Proposal Management.

Product Definitions in PeopleSoft CRM

PeopleSoft CRM uses a product definition to represent each product. The product definition, which is keyed by product ID, stores all of the product information that company representatives require to sell or support the product. PeopleSoft CRM also uses product definitions for:

- Pricing product orders.
- Generating product catalogs.
- Storing product advisor scripts for use by sales and support personnel.

Product Definition Types

PeopleSoft CRM uses these types of product definitions:

- Standard product
- Package product
- Engagement service

See Products.

Product Definition Process

Complete these steps to define products in PeopleSoft CRM:

1. Analyze how the various parts of the CRM system use product definitions.

   For example, the catalog generation process and the ordering process can both use product definitions.

2. Create definitional elements to associate with products.

   Definitional elements are attributes such as product brands, product categories, and competency codes. You associate definitional elements with product IDs to create unique product and product package definitions.

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See Understanding Product Definitional Elements.

3. Select a product type and create a product definition.

   After you define a product, the product ID becomes available on product search lists so that you can access the product definition from other CRM pages.

   Important! In PeopleSoft CRM, you can define a product when you define an item or you can create a product and associate it with existing items. Typically, you begin by defining an item and having the system copy the product ID, description, and standard UOM of the item to the product definition table.

   See Items.

4. Associate definitional elements and other product attributes with the product ID.
5. Select package components (if the product definition is for a product package).
6. Assign product UOMs.
7. Establish product prices.
8. Define relationships between products.
9. Associate notes with products.

Integrations with PeopleSoft SCM and PeopleSoft Proposal Management

Product information is integrated with PeopleSoft SCM (and third-party SCM systems) and PeopleSoft Proposal Management, which is part of the PeopleSoft Enterprise Services Automation product suite, by using enterprise integration points (EIPs). The considerations for using EIPs are discussed in the following paragraphs.

SCM Integrations

SCM systems use product definitions to manage products and product components throughout the manufacturing process. PeopleSoft CRM delivers several EIPs that maintain data integrity between PeopleSoft CRM and SCM systems, including PeopleSoft SCM and third-party systems, by synchronizing product data.

You use the PeopleTools Integration Broker to integrate product data. This technology enables both synchronous and asynchronous messages to be transmitted using one technology.

Note: To synchronize product groups that have product group types of *GEN* between your SCM and CRM databases, initiate the PRODUCT_GROUP_FULLSYNC EIP before initiating the PRODUCT_FULLSYNC EIP, regardless of whether PeopleSoft CRM is the publishing or subscribing database.

These EIPs are used for both publishing and subscribing:

- PRODUCT_SYNC
- PRODUCT_FULLSYNC

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- PRODUCT_SYNC_EFF

Note: If the PRODUCT_SYNC message is active, an add, change, or delete action in the Product Definition component automatically executes the product sync publish logic.

PeopleSoft CRM publishes the PRODUCT_SYNC message whenever product data is added, changed, or deleted using the Product Definition - Definition page, the Package Components page, the Product Price page, the Package Component Pricing page, the Notes page, the Relationships component (PROD_RELATIONS_CMP), and the Product Unit of Measure page.

PeopleTools Integration Broker processes the message and applies a transformation to remove the PRODKIT_HEADER. Any package components that are themselves packages are also stripped from the message. Because PeopleSoft SCM does not permit packages within packages, package components that are themselves packages are also stripped from the message.

PeopleSoft CRM subscribes asynchronously to the PRODUCT_SYNC message that comes from the SCM system. This data is processed directly into the PeopleSoft CRM product tables using component interfaces. A product package header record is added for any kit components that are received from SCM. When a PRODUCT_SYNC or PRODUCT FULL_SYNC message is received, the system runs the subscription logic, which calls one of these component interfaces depending on the content of the message:

- PRODKIT_CI
- PRODKIT_COMPS_PRC_CI
- PROD_DEFN_CI
- PROD_NOTE_CI
- PROD_PRICE_CI
- PROD_RELATIONS_CI
- PROD_UOM_CI

Note: Before publishing the Product full sync message, enter matching values in the product brand table (PROD_BRAND_TBL) using the Product Brand pages in CRM (**Products CRM** > **Product Brand**) and SCM (**Set Up Financials/Supply Chain** > **Product Related** > **Order Management Foundation** > **Brand** > **Product Brand**). If you don't enter values in the product brand table, the system may display an error message.

This table shows how an order represents packages to the PeopleSoft SCM system:

Type	***Line Display***	***Line Data Model/EIP***
0-Static Package (1-level static quantity) PROD_ITEM.PROD_KIT=Y PROD_KIT_HEADER.LT_CONFIG_FLAG=N	Display all components of the package as multiple lines.	Store and publish parent line.

Type	*Line Display*	*Line Data Model/EIP*
1-Package (Kit) (multilevel dynamic quantity) PROT_ITEM.PROD_KIT=Y PROD_KIT_HEADER.LT_CONFIG_FLAG=Y	Display all components of the package as multiple lines.	Store all components as multiple lines, and publish as multiple lines.
2-Configured Package(Kit) PROD_ITEM.PROD_KIT=Y PROD_ITEM.CFG_KIT=Y	Display all components of the package as multiple lines.	Store all components as multiple lines, and publish as multiple lines.
3-Configured Product MASTER_ITEM_TBL.DIST_CFG_FLG=Y	Display high-level parent line.	Store and publish parent line plus configuration.

Proposal Management Integrations

PeopleSoft CRM can send information to PeopleSoft Proposal Management. This action occurs when a quote that originates from a PeopleSoft Sales lead or opportunity or is entered using PeopleSoft Order Capture includes an engagement service product. PeopleSoft Proposal Management prices the engagement and sends pricing information back to PeopleSoft CRM.

This integration consists of these application messages:

- OC_ESA_PROPOSAL

  This message is sent to PeopleSoft Proposal Management when a quote is submitted for an engagement-type service in PeopleSoft Order Capture.

- OC_ESA_PROPOSAL_RESPONSE

  This message returns the capture ID, proposal ID, and version ID from PeopleSoft Proposal Management to PeopleSoft Order Capture.

- ESA_PROPOSAL_PRICE

  When PeopleSoft Proposal Management completes pricing the engagement, pricing information is sent back to PeopleSoft Order Capture.

- OC_ESA_PROPOSAL_STATUS

  This message sends the status of a proposal (for example, draft or negotiated) to PeopleSoft Proposal Management.

Important! Before you can integrate with PeopleSoft Proposal Management, you must define the Engagement Service product.

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See PeopleSoft Order Capture Applications.

Defining Products

To define products, use the Product Definition (PROD_DEFN) component.

Pages Used to Define Products

Page Name	*Definition Name*	*Usage*
Product Definition - Definition Page	PROD_DEFN	Define product information.
Product Definition - External Description Page	PROD_EXT_DESCR	Define the external description of a product.
Product Definition - Attributes Page	RB_ATTR_RUN_PROD	Define product attributes, such as dimensions, materials used in manufacturing, and color.
Product Definition - Attachments Page	PROD_ATT	Attach files to a product.
Product Definition - Installed Product Page	PROD_INSTALL	Define rule sets for processing installed products.
Product Definition - Product Groups Page	PROD_GROUP_LNK	Add products to product groups.
Product Definition - Images Page	PROD_IMAGES	Attach images of different sizes to a product.
Product Definition - Branch Scripts Page	PROD_BSCRIPT	Associate a branch script with a product.
Product Definition - Regions Page	PROD_REGION	Define sales regions for products.
Product Definition - Competitors Page	PROD_COMPTTRS	Track competitors' products.

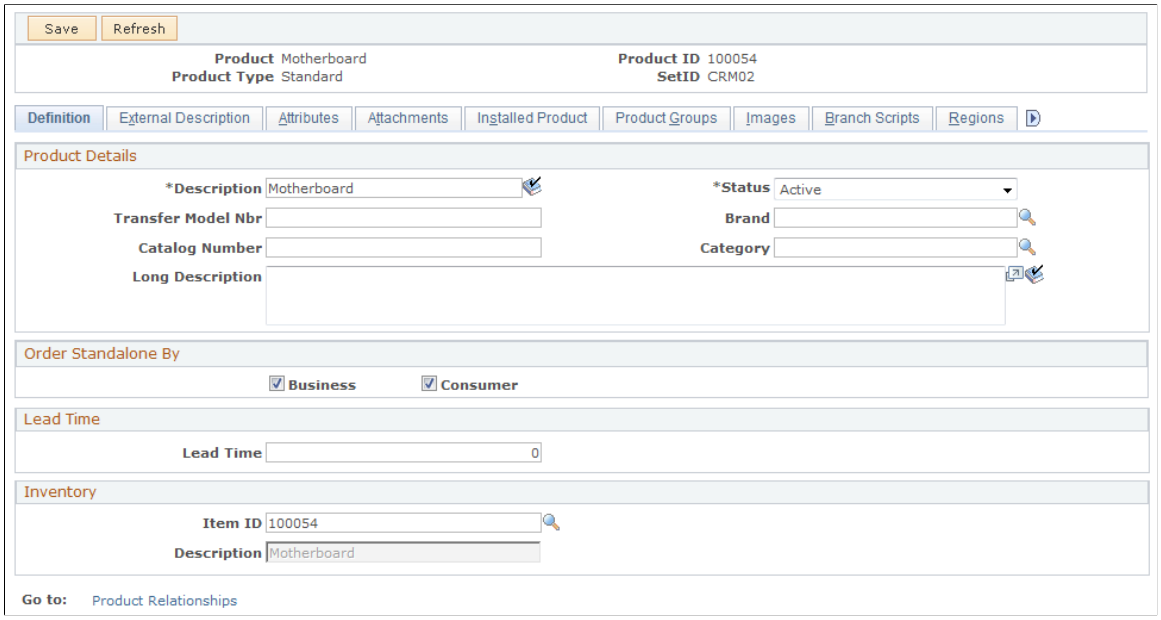
Product Definition - Definition Page

Use the Product Definition - Definition page (PROD_DEFN) to define product information.

Navigation:

Products CRM > **Product Definition** > **Definition**

This example illustrates the fields and controls on the Product Definition - Definition page.



Note: Different sections appear on this page depending on the product type that you select when you add the product definition. The display template that you associate with the product type controls the appearance of the page.

See Product Definitions in PeopleSoft CRM, “Understanding Display Templates” (Automation and Configuration Tools).

Product Details

This information identifies the product, and it appears for all product types. The specific fields that appear vary depending on the requirements of the product type. For example, engagement services do not have a catalog number, model number, brand, or category.

Field or Control	*Description*
Transfer Model Nbr (transfer model number) and **Catalog Number**	Enter the product catalog number and model number if a product appears in another vendor catalog.

Order Standalone By

This group box appears for all product types.

Field or Control	*Description*
Business	Select if the product is available as a standalone product (not part of a package) to businesses.

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Field or Control	*Description*
Consumer	Select if the product is available as a standalone product to consumers.

Note: If you do not select either of these options, the system treats the product as one that is available only as a package component.

Pricing

This section appears if the selected product type for the product definition is *Package.* For packages, indicate the pricing method.

Field or Control	*Description*
at Top Level	Select to use the price that is defined on the Product Price page for the package price.
at Component Level	Select to calculate the package price as the sum of the prices for each component in the package. **Note:** When you select the at Component Level option, define the price for each component of the package using the Package Component Pricing page. Regardless of the pricing option that you select, the total price for the product package is stored in the PROD_PRICE record.

Lead Time

Future order functionality enables a user to place an order that will occur in the future. The future-dated orders are queued in the CRM system and automatically resubmitted to fulfill the order or request. This approach improves performance by not submitting orders until they are due.

See “Understanding Future Dated Orders” (PeopleSoft Order Capture Applications).

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Field or Control	*Description*
Lead Time	Enter the lead time for a product in days. The lead time specified should be the amount of time needed to fulfill the product order. The default is 0, which indicates that the external system can perform the order with no delay. The lead time is taken into account when calculating the order execution date for future dated order. If the lead time is updated, no automatic update occurs for already submitted orders.

Inventory

This section appears only for products of type *Standard.*

Field or Control	*Description*
Item ID	Enter an item ID to associate with the product. If you created the product from an item, the item ID on the Item Definition page appears here. If the specified item is associated with configuration, the standard product can be configured through its product definition. **Note:** Clear the **Item Required** check box on the Product Options page to save products without an item ID.

Related Links

Establishing Product Prices
Creating Product Definitional Elements

Product Definition - External Description Page

Use the Product Definition - External Description page (PROD_EXT_DESCR) to define the external description of a product.

Navigation:

Products CRM > **Product Definition** > **External Description**

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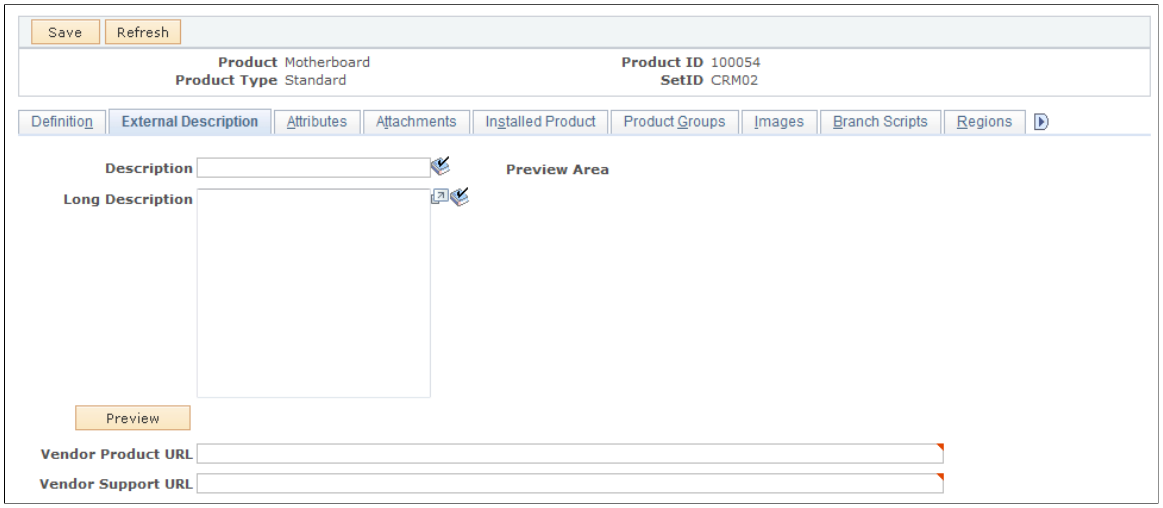
This example illustrates the fields and controls on the Product Definition - External Description page.



Field or Control	*Description*
Description and **Long Description**	Enter short and long external descriptions for the product. The text can include any HTML tags except: • <html> and </html> • <title> and </title> • <header> and </header> • <body> and </body> These main structure tags are unnecessary because they are included in the standard PeopleSoft-generated page. **Note:** Be sure that the HTML code follows proper HTML formatting rules.
Preview	Click to preview the short and long descriptions.

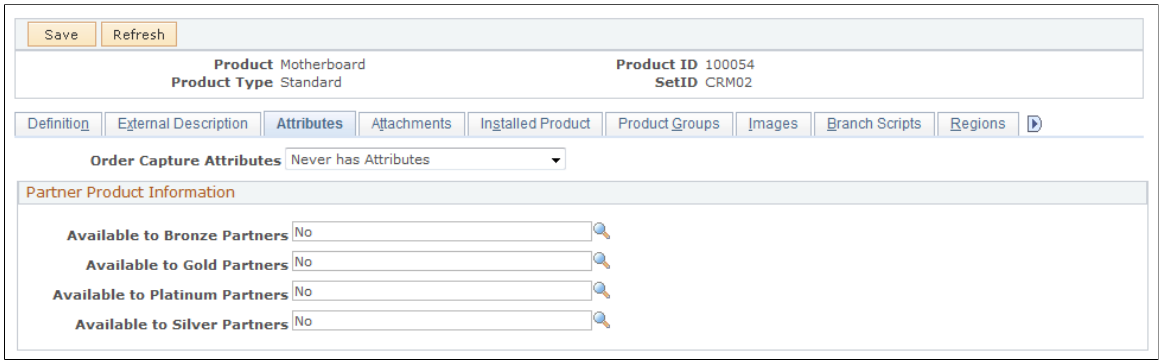
Product Definition - Attributes Page

Use the Product Definition - Attributes page (RB_ATTR_RUN_PROD) to define product attributes, such as dimensions, materials used in manufacturing, and color.

Navigation:

Products CRM > **Product Definition** > **Attributes**

This example illustrates the fields and controls on the Product Definition - Attributes page.



Field or Control	*Description*
Order Capture Attributes	Select an option for the processing of order capture line attributes. The PeopleSoft Order Capture application uses these options to determine how it processes line attributes. Setting either the *Never has Attributes* or the *Always has Attributes* option increases performance because the attributes engine does not need to check for attributes when these options are set. This field is not required. If left blank, *Conditionally has Attributes* is assumed to provide backward compatibility with existing functionality. Possible values are: • *Never has Attributes* Use this setting to indicate that product does not have order capture line attributes. Because attributes are never collected at order processing time for this product when this option is set, Order Capture performs better because it does not need to do the attributes calculation for the product. This increases response times when adding a product to an order and opening up existing orders. • *Always has Attributes* Use this setting if the product has order capture line attributes. Attributes are always collected at order processing time for this product. • *Conditionally has Attributes* Use this setting if the product sometimes has order capture order line attributes. Attributes are collected at order processing time under certain conditions that are based on the values of the order line. This conditional aspect of the attributes is determined at runtime by the attributes engine. Using this option can negatively affect response time.

Note: The specific attributes that you can enter on this page are defined at system installation.

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See “Understanding Attributes” (Automation and Configuration Tools).

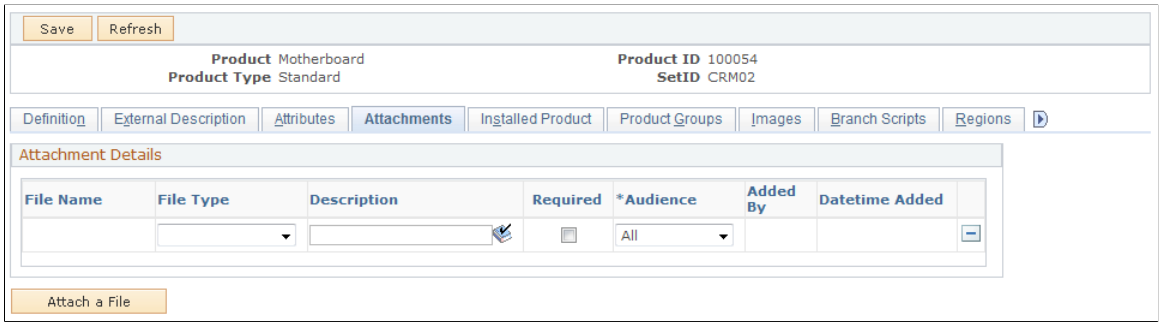
Product Definition - Attachments Page

Use the Product Definition - Attachments page (PROD_ATT) to attach files to a product.

Navigation:

Products CRM > Product Definition > Attachments

This example illustrates the fields and controls on the Product Definition - Attachments page.



Field or Control	*Description*
File Name	Click to view the contents of the attachment.
File Type	Select the attachment type. Options are*Prospectus, Disclosure, Literature,* and *White Paper.*
Required	Select to indicate if the user must view the attachment before ordering the product or if the information is supplemental.

Warning! For product images uploaded to a DB2 platform, the maximum image size is 32K.

Related Links

“Adding Attachments to Notes” (Application Fundamentals)

Product Definition - Installed Product Page

Use the Product Definition - Installed Product page (PROD_INSTALL) to define rule sets for processing installed products.

Navigation:

Products CRM > Product Definition > Installed Product

See Defining Creation and Update Rules for Installed Products, “Setting Up Product Registration” (Application Fundamentals).

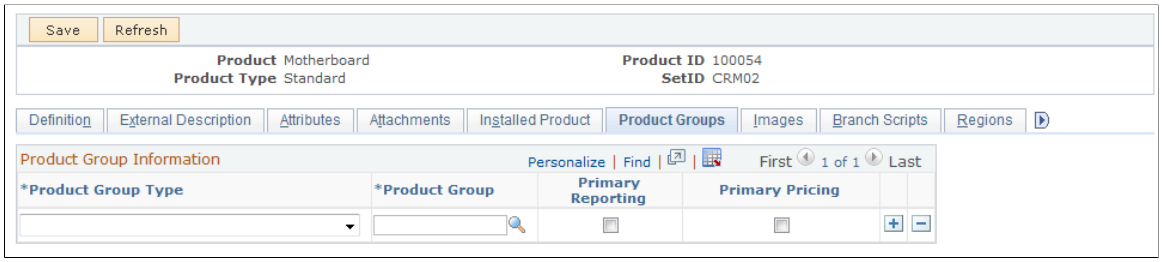
Product Definition - Product Groups Page

Use the Product Definition - Product Groups page (PROD_GROUP_LNK) to add products to product groups.

Navigation:

Products CRM > Product Definition > Product Groups

This example illustrates the fields and controls on the Product Definition - Product Groups page.



Field or Control	*Description*
Product Group Type	Select a product group type. The system comes with predefined product group types that fall into the following categories: pricing, reports, sales buying agreements, transportation lead times, and taxes.
Product Group	Enter the number or name of a product group. A single product can belong to multiple product groups within each group type.
Primary Reporting	Select to indicate a single primary reporting product group when associating multiple groups with the *Reporting* group type. Statistics are distorted if a product appears on the report under every reporting group to which the product is linked.
Primary Pricing	Select to indicate a primary pricing product group if you've entered multiple groups of the *Pricing* group type.

Related Links

Product Group Page

Product Definition - Images Page

Use the Product Definition - Images page (PROD_IMAGES) to attach images of different sizes to a product.

Navigation:

Products CRM > Product Definition > Images

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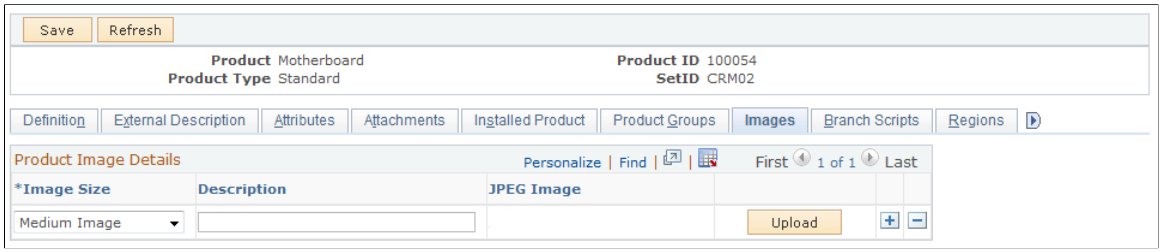
This example illustrates the fields and controls on the Product Definition - Images page.



Field or Control	*Description*
Image Size	Select the size of the image that you want to associate with the product. Options are *Large Image, Medium Image, Small Image,* and *Zoom Image.* You can attach one image of each size.
Upload	Click to locate, upload, and attach an image. **Note:** You can upload and view only JPEG type images. The maximum size of the JPEG file depends on the database platform that you are using. Most systems can handle images up to 32 kilobytes. If you get an error message, click the **Back** button on your browser.

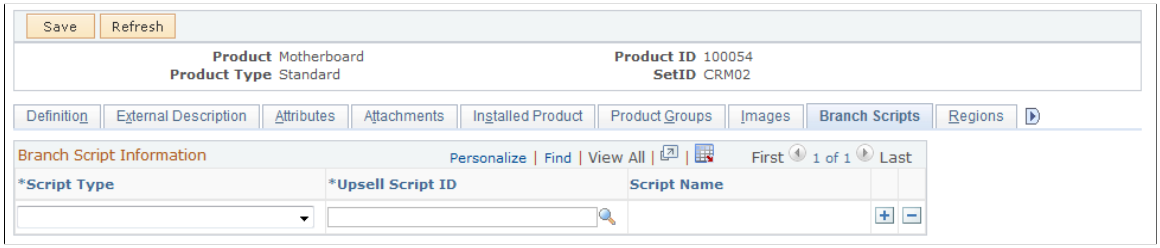
Product Definition - Branch Scripts Page

Use the Product Definition - Branch Scripts page (PROD_BSCRIPT) to associate a branch script with a product.

Navigation:

Products CRM > Product Definition > Branch Scripts

This example illustrates the fields and controls on the Product Definition - Branch Scripts page.



Field or Control	*Description*
Script Type	Select a branch script type. Options are *External Application, Internal Application,* and *Upsell.* You can save only one script per type on this page. **Note:** Up-sell scripts are used to launch a series of questions that enable a customer service representative to sell products on the phone.
Upsell Script ID	Enter the script ID number or the script name.

Related Links

"Understanding Scripts" (Automation and Configuration Tools)

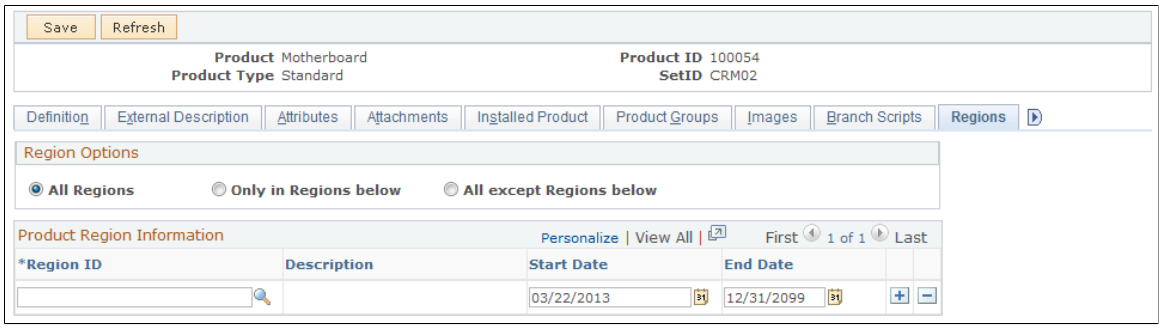
Product Definition - Regions Page

Use the Product Definition - Regions page (PROD_REGION) to define sales regions for products.

Navigation:

Products CRM > Product Definition > Regions

This example illustrates the fields and controls on the Product Definition - Regions page.



Region Options

Field or Control	*Description*
All Regions	Select if the product is available to customers in all regions. **Note:** If you select this option, the system disregards the regions that are associated with particular products.
Only in Regions below	Select to make the product unavailable in all regions except those that you specify.

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Field or Control	*Description*
All except Regions below	Select to make the product available in all regions except those that you specify.
Region ID	Enter one or more region codes if you select either the **Only in Regions below** option or the **All except Regions below** options.

Related Links

"Setting Up Regions" (Application Fundamentals)

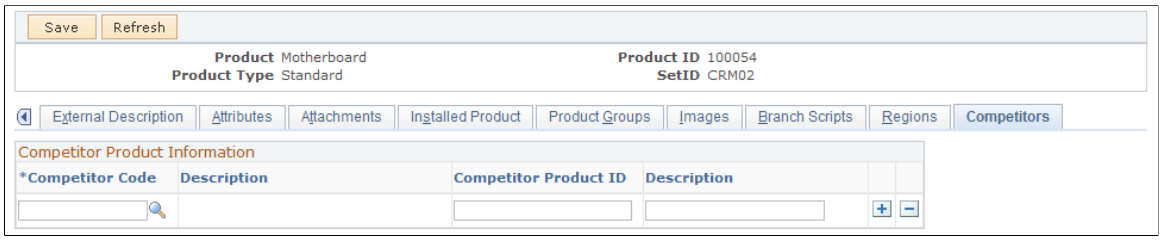
Product Definition - Competitors Page

Use the Product Definition - Competitors page (PROD_COMPTTRS) to track competitors' products.

Navigation:

Products CRM > **Product Definition** > **Competitors**

This example illustrates the fields and controls on the Product Definition - Competitors page.



Field or Control	*Description*
Competitor Code	Enter a competitor code. You can create reports to perform analysis using competitor product information.

Related Links

Defining Creation and Update Rules for Installed Products

Assigning Product UOMs

To assign product UOMs, use the Product Unit of Measure (PROD_UOM) component.

This section discusses how to assign UOMs.

Page Used to Assign Product UOMs

Page Name	*Definition Name*	*Usage*
Product Unit Of Measure Page	PROD_UOM	Select the UOMs that apply to the product. Define minimum and maximum order quantities, valid order increments, and minimum selling prices for the product when sold by that UOM.

Product Unit Of Measure Page

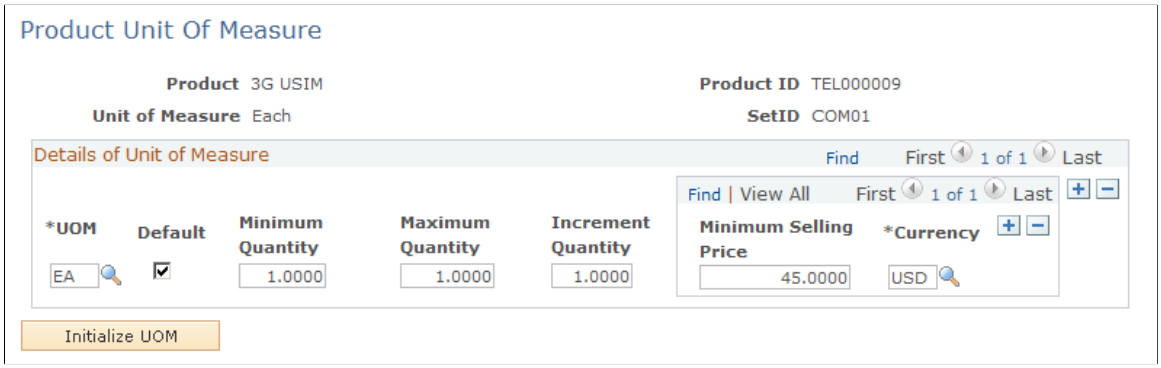
Use the Product Unit Of Measure page (PROD_UOM) to select the UOMs that apply to the product.

Define minimum and maximum order quantities, valid order increments, and minimum selling prices for the product when sold by that UOM.

Navigation:

Products CRM > Product Unit of Measure > Product Unit of Measure

This example illustrates the fields and controls on the Product Unit Of Measure page.



Details of Unit of Measure

Field or Control	*Description*
UOM (unit of measure)	Enter a UOM that applies to sales order units for the product.
Minimum Quantity and **Maximum Quantity**	Enter minimum and maximum order quantity fields. The order entry and quotation entry systems place the order line on hold if these limits are violated.
Increment Quantity	Enter a value if a product can be sold only in specific increments.

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Related Links

Defining Creation and Update Rules for Installed Products

Defining Product Packages

To define product packages, use the Package Components (PRODKIT) component.

This section lists a prerequisite and discusses how to define product packages.

Page Used to Define Product Packages

Page Name	*Definition Name*	*Usage*
Package Components Page	PRODKIT_SUMMARY	Define the components of a product package, specify the maximum and minimum number of optional or required components that a customer can select, and specify (for each component) the maximum and minimum quantity that a customer can order.

Prerequisite

Before you can define product packages, you must specify a package level in the product definition.

Product Packages can only have a UOM of *Each*. If you have not created a UOM for *Each*, navigate to **Set Up CRM** > **Common Definitions** > **Unit of Measure** and create an *EA* unit of measure

Related Links

Defining Products

Package Components Page

Use the Package Components page (PRODKIT_SUMMARY) to define the components of a product package, specify the maximum and minimum number of optional or required components that a customer can select, and specify (for each component) the maximum and minimum quantity that a customer can order.

Navigation:

Products CRM > **Package Components** > **Package Components**

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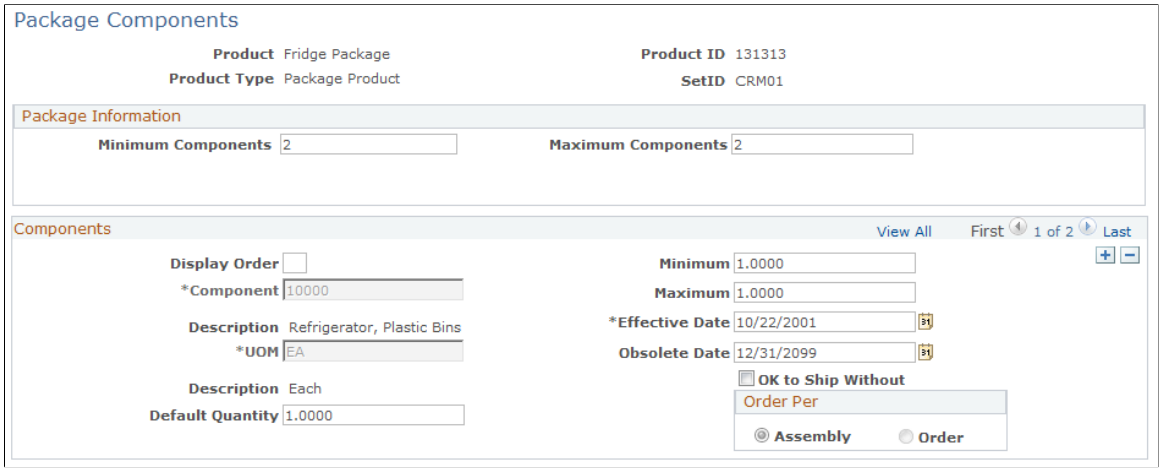
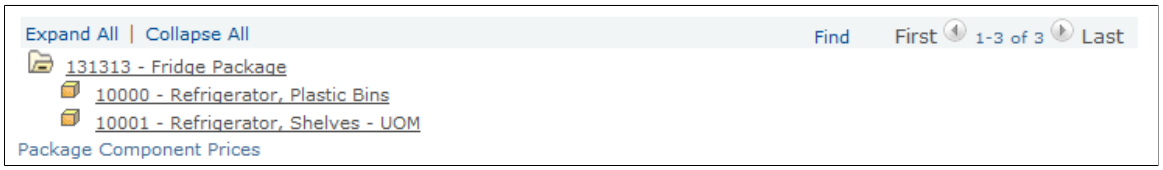
This example illustrates the fields and controls on the Package Components page (1 of 2)



This example illustrates the fields and controls on the Package Components page (2 of 2).



Package Information

Field or Control	*Description*
Minimum Components and **Maximum Components**	Enter the minimum and maximum number of components that a customer must purchase to complete an order.

Components

Products must be defined in the system before they can be added to product packages as components.

Field or Control	*Description*
Display Order	Enter a number (1, 2, and so on) to indicate the order in which the component needs to be displayed in the package hierarchy. The component with the smallest order number is displayed first. By default, this field is empty and the system displays components in the order they are entered.
Component	Enter the ID for each product or package that you want to add to the primary package. A package can consist of a number of individual products and secondary packages.

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Field or Control	*Description*
Default Quantity	Enter the default quantity for the component. This number must be between the minimum and maximum quantity for the component.
Minimum and **Maximum**	Enter the minimum and maximum quantity that a customer can order per component. For example, if a particular component of a package is required but you can only order one, enter *1* in the **Minimum** field and *1* in the **Maximum** field. If a component is an optional part of a package but you can order a maximum of two, enter *0* in the **Minimum** field and *2* in the **Maximum** field. **Note:** A minimum quantity of *0* means that the component is optional.
Effective Date	Enter the start date of the selling period for the product component.
Obsolete Date	Enter the end date of the selling period for the product component.
OK to Ship Without	Select to ship the available product package without waiting for this component.
Order Per	Select whether the component quantity is per package (assembly) or per order. For example, suppose that you need to deliver a manual with a computer package and the customer orders several packages. To send one manual with each ordered package, select *Assembly*. To send one manual with the entire order (regardless of the number of packages in the order), select the *Order* field.

Package Hierarchy

This section displays the components of primary and nested packages using a tree structure.

Establishing Product Prices

To establish product prices, use the Product Price (PROD_PRICE) and the Package Component Pricing (PRODKIT_COMPS_PRC) components.

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Pages Used to Establish Product Prices

Page Name	*Definition Name*	*Usage*
Product Price Page	PROD_PRICE	Set prices for standalone products and for product packages by using top-level pricing.
Package Component Pricing Page	PRODKIT_COMPS_PRC	View prices for each package component for product packages that uses component-level pricing.

Understanding Product Pricing

The sources and definitions of product prices vary depending on how you define products. Note these differences:

- Prices for products that are created in PeopleSoft SCM or a third-party SCM system are defined by inventory business units unless the product is nonstockable (for example, a service such as installation).

  When you synchronize with a SCM system, you must enter the inventory business units into the Business Unit table in the PeopleSoft CRM system.

- Product definitions created in PeopleSoft CRM do not require the inventory business unit field.

  In PeopleSoft CRM, the inventory business unit is unknown when a product is ordered, and the system uses the lowest price from any inventory business unit associated with the product.

See Also *PeopleSoft FSCM Inventory*

Related Links

Understanding Item Definition in PeopleSoft CRM

Product Price Page

Use the Product Price page (PROD_PRICE) to set prices for standalone products and for product packages by using top-level pricing.

Navigation:

Products CRM > **Product Price** > **Product Price**

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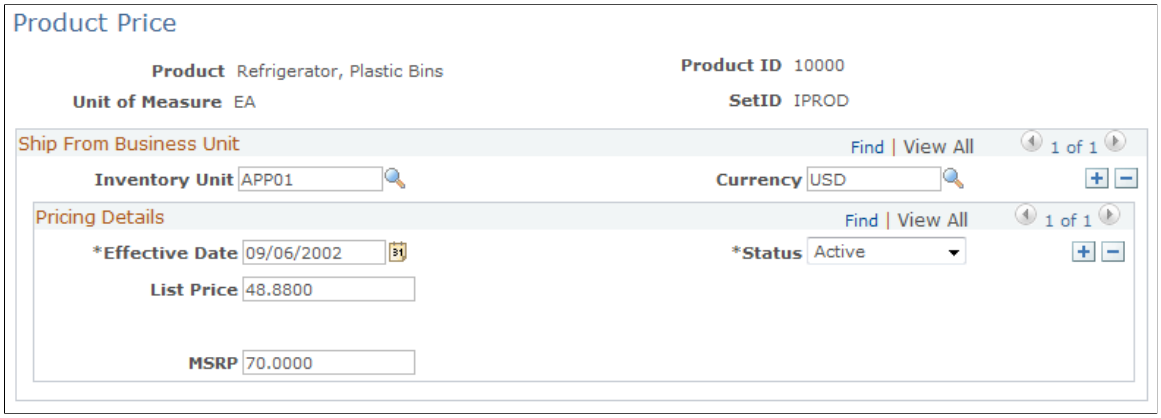
This example illustrates the fields and controls on the Product Price page.



Ship From Business Unit

Field or Control	*Description*
Inventory Unit	Enter the inventory business unit of the warehouse. This field is validated against the BUS_UNIT_TBL_FS table in PeopleSoft CRM. This field is optional for a noninventoried product. **Note:** Inventory business units are established in PeopleSoft SCM or the order fulfillment system. They are synchronized with PeopleSoft CRM using a business unit EIP.
Currency	Enter the currency that is used for the inventory business unit.

Pricing Details

Field or Control	*Description*
List Price	Enter the product list price. The system applies price adjustments against the list price.
Package Pricing	Click to view package component pricing details (available only for packages that are priced at the component level).

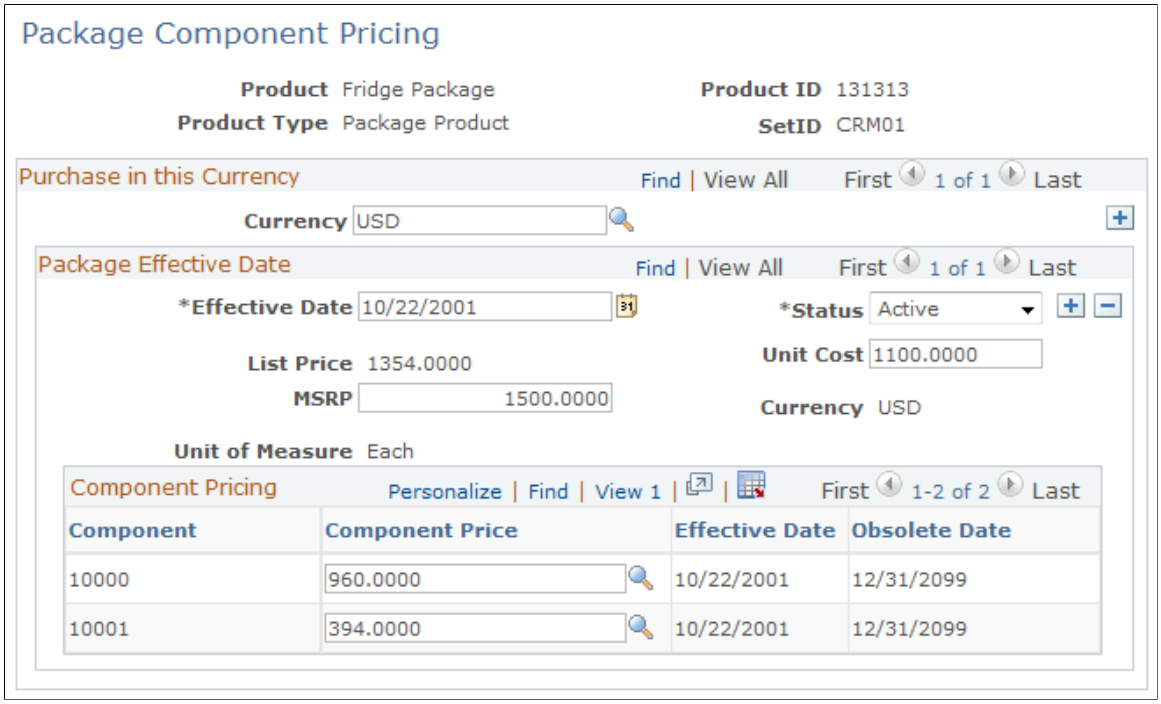
Package Component Pricing Page

Use the Package Component Pricing page (PRODKIT_COMPS_PRC) to view prices for each package component for product packages that uses component-level pricing.

Navigation:

Products CRM > Package Component Pricing > Package Component Pricing

This example illustrates the fields and controls on the Package Component Pricing page.



This page lists the components of the package, the dates on which the component became part of the package, and the date it became obsolete in the package.

Field or Control	*Description*
Currency	Select a value to represent the currency you want to use for the pricing component you are setting up. You cannot enter information in the **MSRP** and **Unit Cost** fields until you enter a value in the **Currency** field.
List Price	This field displays the sum of the component prices.
Unit Cost and **MSRP** (manufacturer's suggested retail price)	These fields are for informational purposes only. CRM does not use them to initiate any processing. These values, if available, are sent to Order Management in PeopleSoft SCM.

Related Links

Assigning Product UOMs
Defining Product Packages
Defining Products
"Setting Up Currencies" (Application Fundamentals)

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Managing Product Relationships

This section provides an overview of product relationships, lists prerequisites, and discusses how to define product relationships.

Pages Used to Manage Product Relationships

Page Name	*Definition Name*	*Usage*
Product Relationships - Product Relationships Page	PROD_RELATIONS	Define relationships between products.
Product Relationships - Relationships Overview Page	PROD_REL_OVERVIEW	View effective relationships between products.

Understanding Product Relationships

PeopleSoft CRM comes with a number of predefined relationship types that enable you to define relationships between products:

- Complement

  A complement is an accessory to another product. For example, a keyboard might be a complement to a desktop computer.

- Cross-sell

  A cross-sell is a product that enhances or extends the capabilities of another product. For example, a DVD player might be a cross-sell for a television.

- Up-sell

  An up-sell is a product that is superior to the product that the customer inquires about or orders.

- Product alternate

  A product alternate is offered in place of another. For example, suppose that the delivery time for a product does not meet the customer's needs. In that case, you might offer a product alternate.

  For a product to be considered an alternate product, you must link an item to it.

- Prerequisite

  A prerequisite is a product that is required for another product to function properly.

- Replacement product

  A replacement product is offered in place of another product that a customer orders if the original product is no longer available.

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Related Links

Product Relationships - Product Relationships Page

Prerequisites

Before you define relationships between products, you must:

1. Review the available relationships that are delivered with the system.
2. Define additional relationships that are required by the business.
3. Specify optional relationship attributes.

Related Links

Product Relations Codes Page

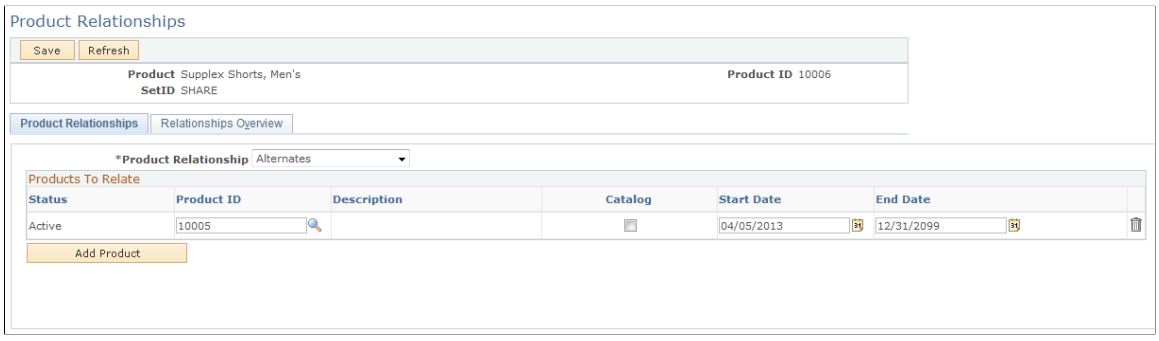
Product Relationships - Product Relationships Page

Use the Product Relationships - Product Relationships page (PROD_RELATIONS) to define relationships between products.

Navigation:

Products CRM > Product Relationships > Product Relationships

This example illustrates the fields and controls on the Product Relationships page.



Note: For a product to be considered an alternate product, you must link an item to it.

Products To Relate

Field or Control	*Description*
Product Relationship	Select the relationship between the product in the **Product** field and the product in the **Product ID** field. The system may display a different set of fields based on your selection.

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Field or Control	*Description*
Product ID	Enter the ID of the product that you are relating to the product in the **Product** field.
Start Date and **End Date**	Enter the start and end dates of the relationship.

Entering Product Notes

This section lists a prerequisite and discusses how to enter product notes.

Page Used to Define Product Notes

Page Name	*Definition Name*	*Usage*
Product Notes Page	PROD_NOTE	Enter standard or custom product notes.

Prerequisite

Before you can associate a standard note with a product, you must define the note on the Standard Notes page.

See “Understanding Notes and Attachments” (Application Fundamentals).

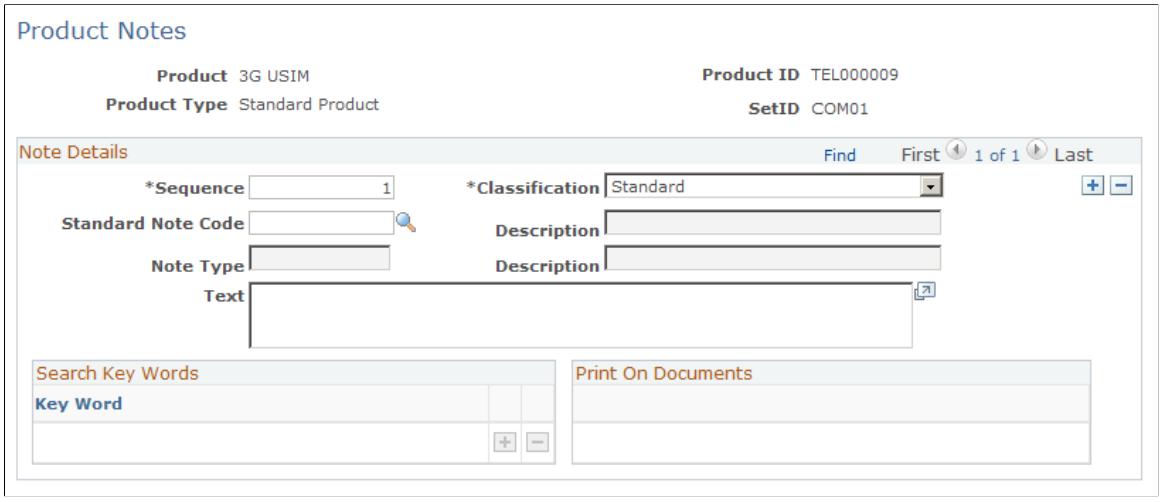
Product Notes Page

Use the Product Notes page (PROD_NOTE) to enter standard or custom product notes.

Navigation:

Products CRM > **Product Notes** > **Product Notes**

This example illustrates the fields and controls on the Product Notes page.



Field or Control	*Description*
Sequence	Enter a sequence number to specify the order in which notes appear on documents.
Classification	Select *Standard* or *Custom.*
Standard Note Code	Enter the code of a standard note to associate with the product.
Note Type	Enter the note type for a custom note associated with the product.
Text	Enter the note text for a custom note. If you use a standard note, this field displays the predefined note text.

Related Links

“Setting Up Note Types” (Application Fundamentals)
“Creating Standard Notes and Product Notes” (Application Fundamentals)
“Entering and Viewing Notes” (Application Fundamentals)

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Chapter 8

Defining Options for Integration to the Asset Repository Module in PeopleSoft Financials

Understanding Integration Options for the Asset Repository Module

Enabling integration between PeopleSoft Customer Relationship Management (CRM) and PeopleSoft Financial and Distribution Management (FDM) occurs on the Installed Product Configuration page, which is keyed by setID. Select the box labeled **Enable Asset Integration with PeopleSoft Financials** to allow integration. Also, when this check box is selected, the check box that controls the display of the installed asset serial ID is automatically selected because the PeopleSoft Financials application requires Serial ID values for all hardware assets.

The check box is the only setup option required for this integration other than the Product Mapping for Hardware Assets page and the full synchronization of manufacturer and asset subtype data.

However, other standard PeopleSoft integration-related setups are required. For example, you may need to configure the integration gateways, activate the relevant service operations, configure and activate routings, and set the message queues to running. These are all standard integration setup requirements.

Since the asset entries also include employee, department, and location values, the entries for these three types of data should also be in sync between the two systems. Therefore, you also must synchronize the existing messages for employee, department, and location in addition to synchronizing the new messages for manufacturers and asset subtypes.

See Also

PeopleTools: Integration Broker

PeopleTools: Integration Broker Administration

PeopleTools: Integration Broker Service Operations Monitor

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Chapter 9

Creating Catalogs

Understanding Catalogs

Catalogs are a single group of products or services that are marketed and displayed together because they share common criteria. PeopleSoft Customer Relationship Management (PeopleSoft CRM) enables you to define the layout and content of online catalogs for internal and external use. You define the look and feel of catalogs by creating display templates, and then you define the contents that you want to organize and present according to the template definitions. You can designate products for inclusion in a catalog either by direct association (using product IDs) or by creating business rules to dynamically build product content based on the selection criteria that you define. Similarly, you can control user access to catalogs by associating a Security Membership List with specific catalogs.

Catalogs in PeopleSoft CRM

You can access and search catalogs from different locations within PeopleSoft CRM, and functional areas within the CRM applications are dependent on catalog definitions. Catalogs can be used and searched by external customers who are purchasing products or services, internally by customer service representatives (CSRs) who need product information, and by others within an enterprise. Catalogs and catalog data are accessible from within and outside of PeopleSoft CRM.

Internal Access

Catalog information is available from these internal sources:

- PeopleSoft Order Capture

  In PeopleSoft Order Capture, CSRs access catalog data and run catalog searches from the Entry form to obtain up-to-date information about products before they enter an order or provide quotes. In addition, access to products can be limited and validated against catalogs when a product is added to the order. CSRs can then use the product comparison tool, navigate to product details, and copy products from the search results back to the order entry form.

  Note: Users can navigate to Product Search in PeopleSoft Order Capture and enter search criteria. They can also personalize the PeopleSoft CRM portal to display a product search pagelet (if the portal pack is installed).

  See “Understanding Future Dated Orders” (PeopleSoft Order Capture Applications).

- PeopleSoft Sales

  From the Lead and Opportunity components users can drill into the Product Search component and perform keyword searches for products. Users can then use the product comparison tool, navigate to product details, and copy products from the search results back to PeopleSoft Sales.

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External Access

Catalog information is available from these external sources:

- PeopleSoft Order Capture Self Service

  You can link to product detail pages from order lines, access and browse catalogs.

- Customer registry or home page

  Users can browse and search the catalog. Customers can also customize the PeopleSoft CRM portal to display a catalog search pagelet (if the portal pack is installed).

Prerequisites

Before you create catalog display templates or define the content of a catalog, you must define products using the Define Products component. In addition, because creating display templates and defining catalog content are interdependent setup steps, a catalog is not fully defined until you define both templates and content.

Note: Catalogs are limited to 1000 products per catalog.

To ensure that a user has access to catalogs, complete these setup steps:

1. Navigate to **Set Up CRM** > **Security** > **CRM Application Security** > **Add membership list.**
2. Enter *Order Capture Admin Mem List* in the **Name** field.
3. Enter *Order Capture Admin Membership List* in the **Description** field.
4. Click **Next.**
5. Select *Role* from the **Security Object** drop-down list.
6. Select *Multiple Members* in the **Membership Applies to** field.
7. Click **Next**.
8. Select *Order Capture Admin* in the **Role Name** field.
9. Click **Finish.**
10. Click **Save.**

Next:

1. Navigate to **Set Up CRM** > **Security** > **CRM Application Security** > **Add security profile.**
2. Enter *Order Capture Admin Profile* in the **Name** field.
3. Enter *Order Capture Admin Profile* in the **Description** field.
4. Click **Add functional option group.**
5. Select the **Order Capture Admin** check box.

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6. Click **Finish.**
7. Click the Membership tab.
8. Click **Add Membership List.**
9. Select *Role* from the **Security Object** drop-down list.
10. Select *Multiple Members* in the **Membership Applies to** field.
11. Click **Next**.
12. Select the **Order Capture Admin Mem List** check box.
13. Click **Finish**.
14. Click **Save**.

Related Links

Managing Product Relationships

Creating Catalog Display Templates

To create catalog display templates, use the Catalog Template Definition (RO_DISPLAY_TEMPL) component.

Pages Used to Create Catalog Display Templates

Page Name	*Definition Name*	*Usage*
Display Template Page	RO_DISPLAY_TEMPL	Define the look and feel of catalogs and product display pages in online catalogs.
Product Display Page Page	RO_PRODUCT_DISPLAY	Define the look and feel of product display pages in online catalogs.
Product Compare Page Page	RO_PRODUCT_COMPARE	Define the look and feel of product comparison pages in online catalogs.
Product Details Page	RO_PRODUCT_DETAIL	Define the look and feel of product detail pages in online catalogs.
Featured Products Page	RO_PRODUCT_FEATURE	Define featured products displays.
Product Search Page	RO_PRODUCT_SEARCH	Control the visibility options from the product search.

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Understanding Catalog Display Templates

You can create display templates to define the layout and organization of a catalog.

Note that this task is separate from defining the products that the catalog contains. You can then apply the same reusable templates to different product collections defined in Catalog Setup. Defining layout and presentation separately from content enables you to easily modify, update, and recombine both products and presentational formats to meet different user and display requirements.

Template Setup Procedures

Define display templates using the Catalog Template Setup component. Each page in this component controls the look and feel of one or more corresponding pages or displays in the online product catalog. The catalog display page is the initial page that users access. It contains a list of catalogs and associated images. The product display page is normally the second page that users access. It can display both products and nested catalogs (as well as associated images). Access this page from a link on the catalog display page.

Many users may want to replace the Browse Catalog functionality with the Find functionality as the default. To set up the Find functionality, refer to the section on Searching Catalogs.

See Searching Catalogs.

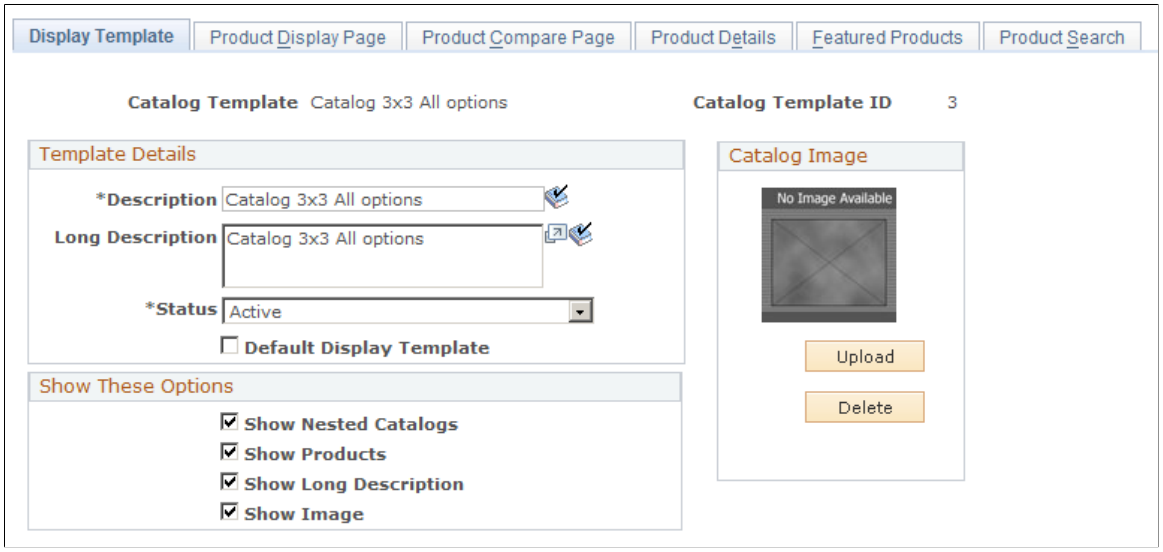
Display Template Page

Use the Display Template page (RO_DISPLAY_TEMPL) to define the look and feel of catalogs and product display pages in online catalogs.

Navigation:

Catalog Management CRM > Catalog Template Definition > Display Template

This example illustrates the fields and controls on the Display Template page.



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Template Details

Field or Control	*Description*
Description and **Long Description**	Enter a short and long description for the display template.
Status	Select whether the display template is *Active* or *Inactive.*
Default Display Template	Select to make this the default display template. PeopleSoft Order Capture uses the default template to determine the catalog page display when a display template is unavailable. For example, because users do not initiate product searches from within a particular catalog, how do you know which catalog product details definition to display when the user clicks a particular product after searching for it? In this case, the default catalog definition displays the product details. The same is true when a user accesses a particular product on an order. Similarly, the first page that users see when browsing catalogs is a list of catalogs. The catalog engine uses the default display template to determine whether or not to display the catalog images and long descriptions of these catalogs (catalog images appear if you select the **Images** check box on the Product Display Page page). **Note:** Only one default display template is valid in the system.

Show These Options

Field or Control	*Description*
Show Nested Catalogs	Select to have a catalog's secondary, nested catalogs (if any) appear on the product display page and to give users access to them.
Show Products	Select to have products or services that are associated with a catalog appear on the product display page and to enable users to access product details.
Show Long Description	Select to have the long description of a catalog appear. Otherwise, the system displays the short description from the Product Catalog page. **Note:** Enter the long description of catalogs on the Product Catalog page.

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Field or Control	*Description*
Show Image	Select to show an image if a catalog has no image. You must upload the filler image on this page. Select the image representing a catalog on the Product Catalog page. **Note:** If the catalog has an image and you want it to appear on the initial catalog display page, select **Images** on the default template's Product Display Page.

Catalog Image

Field or Control	*Description*
Upload	Click to upload a filler image to use when a catalog image is not available or to display no catalog image.
Delete	Click to delete the filler image.

Product Display Page Page

Use the Product Display Page page (RO_PRODUCT_DISPLAY) to define the look and feel of product display pages in online catalogs.

Navigation:

Catalog Management CRM > **Catalog Template Definition** > **Product Display Page**

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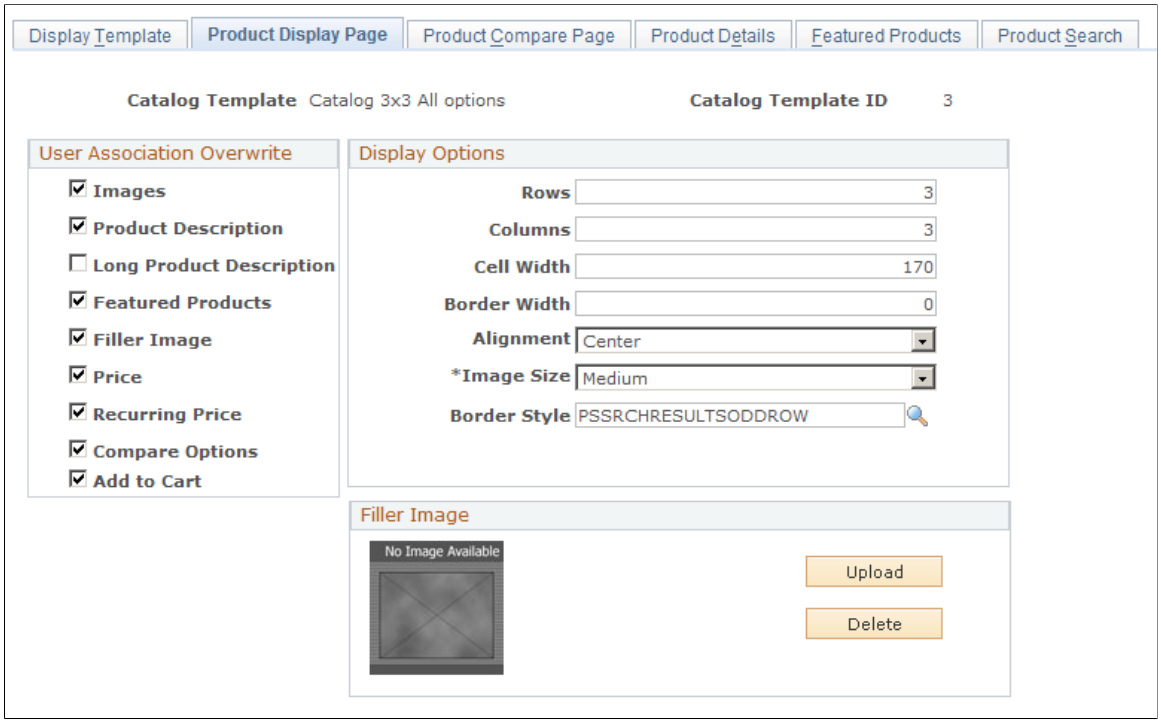
This example illustrates the fields and controls on the Product Display Page page.



User Association Overwrite

Field or Control	*Description*
Images	Select to display product and nested catalog images on the catalog's product display page. These images will function as links to product detail and product display pages. **Note:** Associate images with catalogs on the Product Catalog page. Associate images with products on the Images page in the Product Definition component.
Product Description	Select to show products' short descriptions on the product display page. These descriptions will function as links to product detail pages. **Note:** Short descriptions come from the External Description page in the Product Definition component.
Long Product Description	Select to show products' long descriptions on the catalog's product display page.

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Field or Control	*Description*
Featured Products	Select to identify products that are marked as *Featured* on the catalog's product display page. **Note:** Define the look and feel of featured products on the Featured Products page of the Catalog Template Setup component. Select actual products to be featured in a catalog on the Featured Products page of the Catalog Setup component.
Filler Image	Select to show a filler image on the catalog's product display page if a product has no image associated with it. You must upload the filler image on this page.
Price	Select to show product prices on the catalog's product display page. **Note:** The product price is for single, one-time charges. Prices can come from price sets that are defined in the pricing engine, the **List Price** field on the Product Price page, or the **List Price** field on the Package Component Pricing page (if the product is a package that is priced at the component level).
Compare Options	Select to enable users to compare products (check boxes and a **Compare** button appear on the catalog's product display page). **Note:** You cannot include nested catalogs in comparisons.
Add to Cart	Select to enable users to add products to their carts.

Display Options

Field or Control	*Description*
Rows	Enter the number of rows of products or nested catalogs you want to appear on the catalog's product display page.
Columns	Enter the number of columns of products or nested catalogs you want to appear on the catalog's product display page.

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Field or Control	*Description*
Cell Width	Enter the cell width for a single nested catalog or product on the product display page. If you leave this field blank, the cells expand and shrink based on the contents, and each column expands to the largest width of any child cell.
Border Width	Enter the width of the cell borders.
Alignment	Select *Center, Right,* or *Left.*
Image Size	Select *Large, Medium, Small,* or *Zoom.* **Note:** Size refers to the Product Image page and the corresponding image sizes that are loaded there for each product. For nested catalogs, it uses the image (and size) that is loaded to the catalog.
Border Style	Select the style class of the cell borders. The background color of a cell's style class determines the cell's border color.

Filler Image

Field or Control	*Description*
Upload	Click to locate and attach a filler image to use on the product display page when a product image is not available or to display no product image.
Delete	Click to delete the filler image.

Product Compare Page Page

Use the Product Compare Page page (RO_PRODUCT_COMPARE) to define the look and feel of product comparison pages in online catalogs.

Navigation:

Catalog Management CRM > **Catalog Template Definition** > **Product Compare Page**

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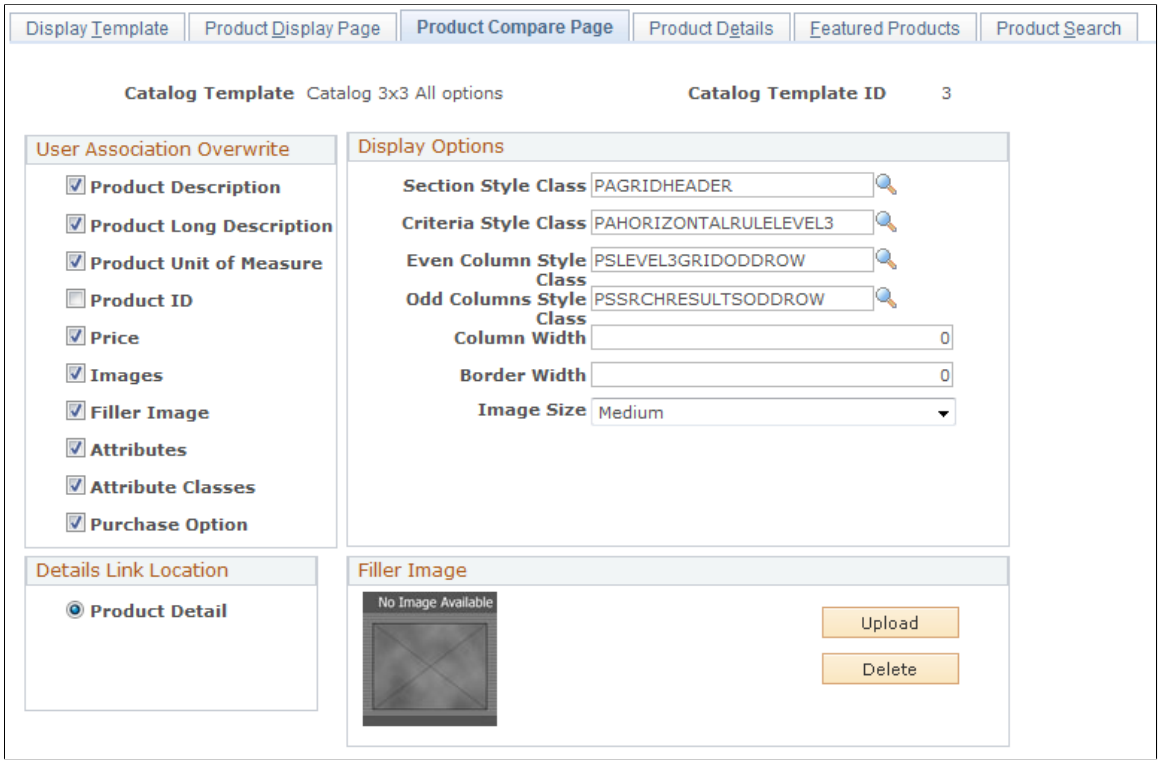
This example illustrates the fields and controls on the Product Compare Page page.



User Association Overwrite

Field or Control	*Description*
Product Description	Select to show products' short descriptions on the catalog's product comparison page. **Note:** Short descriptions come from the External Description page in the Product Definition component.
Product Long Description	Select to show products' long descriptions on the comparison page. **Note:** Long descriptions come from the External Description page in the Product Definition component.
Product Unit of Measure	Select to show a product's default unit of measure (UOM) in a comparison. **Note:** Set the default UOM on the Product Attributes by UOM page.

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Field or Control	*Description*
Product ID	Select to show the Product ID on the comparison page.
Price	Select to display product prices in a comparison. **Note:** The product price is for single, one-time charges. Prices can come from price sets that are defined in the pricing engine, the **List Price** field on the Product Price page, or the **List Price** field on the Package Component Pricing page (if the product is a package that is priced at the component level).
Images	Select to show product images on the catalog's comparison page. **Note:** Associate images with products on the Images page in the Product Definition component.
Filler Image	Select to use a filler image if a product has no image associated with it. You must upload the filler image on this page.
Attributes	Select to display product attributes in a comparison. Only attributes whose group usage type is *Information* appear in a product comparison. **Note:** Define product attributes on the Attributes page in the Define Products component. Define attribute group usage types on the Attribute Groups page.
Attribute Classes	Select to organize the attributes that appear in a comparison into attribute classes or types. For example, materials, dimensions, and patterns are different attribute classes.
Purchase Option	Select to add a **Purchase This Product** link to the catalog's comparison page. Users click this link to access the product's details page, where they will find the **Add to Cart** button (if enabled on the Product Details page).

Field or Control	*Description*
Product Detail	Select to have users access the Catalog's Product Detail page when they navigate to a product on the Compare page.

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Display Options

Field or Control	*Description*
Section Style Class	Enter the style class to use for the comparison page section headers.
Criteria Style Class	Enter the style class to use for the comparison page column that contains the elements to be compared (the leftmost column on the page).
Even Column Style Class	Enter the style class to use for the second (even-numbered) product column on the comparison page.
Odd Columns Style Class	Enter the style class to use for the odd-numbered product columns on the comparison page.
Column Width	Enter the width of the columns on the comparison page. If you leave this field blank, the columns expand and shrink based on their contents, and each column expands to the largest width of any child column.
Border Width	Enter the width of the border between all of the columns and rows in the comparison table.
Image Size	Select *Large, Medium, Small,* or *Zoom.* **Note:** Size refers to the Product Image page and the corresponding image sizes that are loaded there for each product. For nested catalogs, it uses the image (and size) that is loaded to the catalog.

Filler Image

Field or Control	*Description*
Upload	Click to upload a filler image to use on the product display page when a product image is not available or to display no product image.
Delete	Click to delete the filler image.

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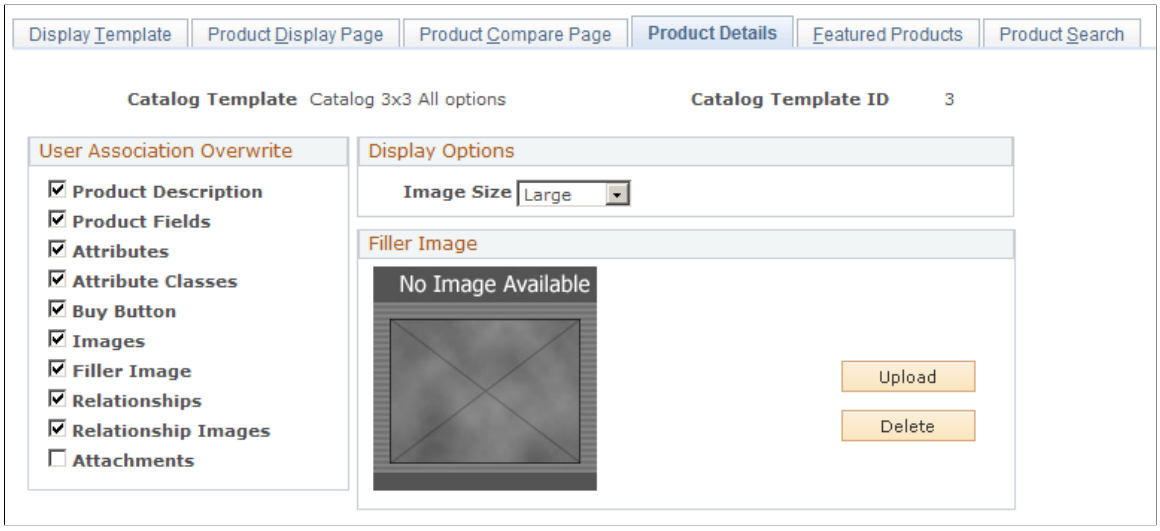
Product Details Page

Use the Product Details page (RO_PRODUCT_DETAIL) to define the look and feel of product detail pages in online catalogs.

Navigation:

Catalog Management CRM > Catalog Template Definition > Product Details

This example illustrates the fields and controls on the Product Details page.



User Association Overwrite

Field or Control	*Description*
Product Description	Select to display product short descriptions on the catalog's product details page. **Note:** Short descriptions come from the External Description page in the Product Definition component.
Product Fields	Select to display product fields on the catalog's product details page. These fields include **Unit of Measure, Quantity,** and **Price.**
Attributes	Select to display product attributes on the details page. Only attributes whose group usage type is *Information* appear on the Product Details page. **Note:** Define product attributes on the Attributes page in the Define Products component. Define attribute group usage types on the Attribute Groups page.

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Field or Control	*Description*
Attribute Classes	Select to organize the attributes that appear in a comparison of attribute classes or types. For example, materials, dimensions, and patterns are different attribute classes.
Buy Button	Select to enable the **Add to Cart** button and functionality on the Product Details page.
Images	Select to display product images on the catalog's Product Details page. **Note:** Associate images with products on the Images page in the Product Definition component.
Filler Image	Select to use a filler image if a product has no image associated with it. Upload the filler image on this page.
Relationships	Select to show product relationships on the Product Details page. In PeopleSoft CRM, products can be related to other products as cross-sell or up-sell opportunities, function as alternates or replacements for other products, complement other products, or be defined as prerequisites for the purchase of other products. These relationships can appear on the Product Details page to promote additional sales opportunities. **Note:** Define relationships between products on the Product Relationships page.
Relationship Images	Select to display images of related products on the catalog's product details page.
Attachments	Select to enable the Attachment functionality.

Display Options

Field or Control	*Description*
Image Size	Select *Large, Medium, Small,* or *Zoom.* **Note:** Size refers to the Product Image page and the corresponding image sizes that are loaded there for each product. For nested catalogs, the system uses the image (and size) that is loaded to the catalog.

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Filler Image

Field or Control	*Description*
Upload	Click to upload a filler image to use when a product image is not available or to display no product image.
Delete	Click to delete the filler image.

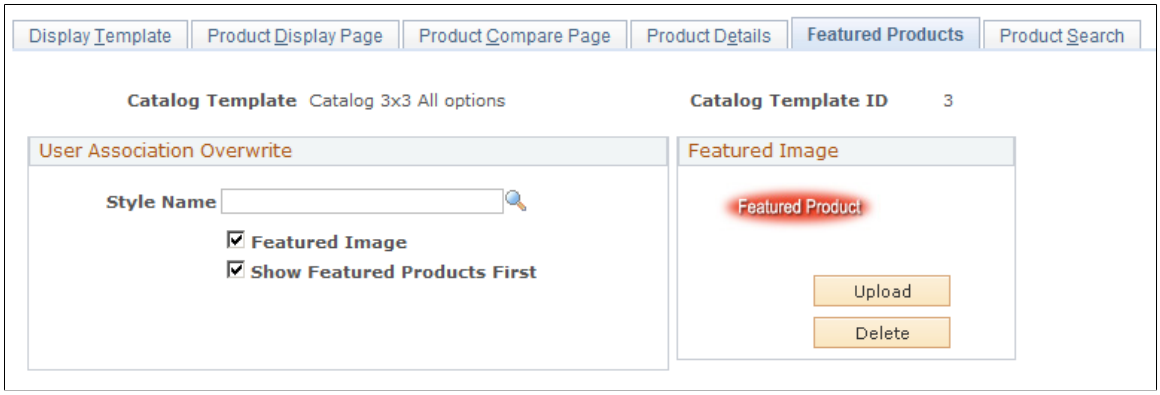
Featured Products Page

Use the Featured Products page (RO_PRODUCT_FEATURE) to define featured products displays.

Navigation:

Catalog Management CRM > **Catalog Template Definition** > **Featured Products**

This example illustrates the fields and controls on the Featured Products page.



User Association Overwrite

Field or Control	*Description*
Style Name	Enter a cell style to use for featured products.
Featured Image	Select to have the image that is uploaded on this page appear on catalog display pages when a product is marked as *Featured.*
Show Featured Products First	Select to have all of the products that are marked as *Featured* appear before other products. Use this option to show promotional products to users before they see other products.

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Featured Image

Field or Control	*Description*
Upload	Click to upload a filler image to use when a product image is not available or to display no product image.
Delete	Click to delete the filler image.

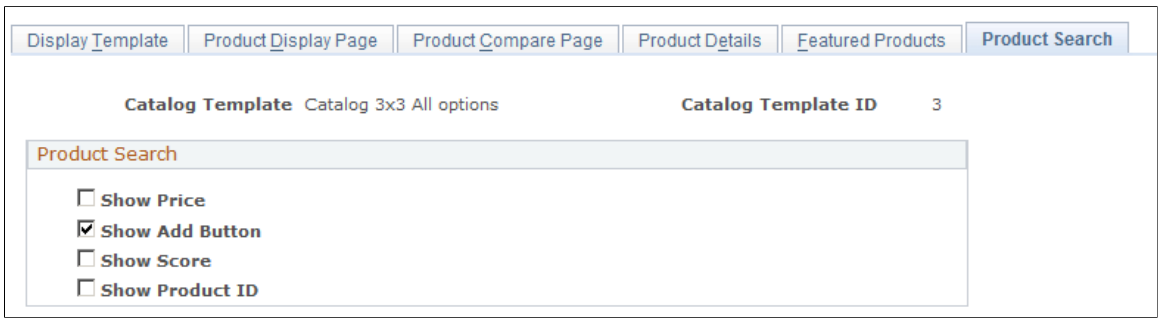
Product Search Page

Use the Product Search page (RO_PRODUCT_SEARCH) to control the visibility options from the product search.

Navigation:

Catalog Management CRM > **Catalog Template Definition** > **Product Search**

This example illustrates the fields and controls on the Product Search page.



Product Search

Field or Control	*Description*
Show Price	Select to show the price of the products in Search Results on the Product Search page.
Show Add Button	Select to show the **Add** button in Search Results on the Product Search page.
Show Score	Select to show the Score in the **Search Results** area on the Product Search page.
Show Product ID	Select to show the Product ID in the **Search Results** area on the Product Search page.

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Defining Catalog Content and Permissions

To define catalog content and permissions, use the Catalog Definition (RO_CATALOG) component.

Pages Used to Define Catalog Contents and Permissions

Page Name	*Definition Name*	*Usage*
Product Catalog Page	RO_PRD_CATALOG	Define catalog IDs and select default display templates to control the look and feel of catalogs; populate catalog cache tables.
Clone a Catalog Page	RO_CAT_CLONE	Create copies of catalogs.
Product Association Page	RO_PRD_ASSOCIATION	Define catalog content by direct or business rule association.
Security Membership Page	RO_CAT_SEC	Define user access and experience by defining membership lists.
Membership List Page	RSEC_MEMBER_SMRY	Define memberships to enable visual access to catalogs.
Nested Catalogs Page	RO_NEST_CAT	Link nested catalogs to a main catalog.
Featured Products Page	RO_FEATURED_PRD	Select products to be featured in catalogs.
Recommendation Page	RO_RECOMMENDATION	Select to show or not show recommendations.

Understanding Catalog Content and Permissions

This section discusses:

- Catalog generation.
- Direct association.
- Business rule association.
- Security memberships.

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Catalog Generation

PeopleSoft CRM enables you to generate catalogs dynamically based on rules that you define online. These rules determine which products appear in catalogs, who can access catalogs, and which products are featured in catalogs. You can also link products to catalogs and define user access by direct association using product IDs and user IDs.

Direct Association

You can associate both standard and featured products with catalogs by Direct association. Direct association enables you to link specific product IDs to one or more catalog IDs. Only products associated with a catalog ID can appear in the catalog.

Business Rule Association

Business rule association enables you to define a rule that is based on field values such as product brand, product category, and product group as well as other product attributes. For example, you could define a rule that specifies that only a specific product brand can appear or be featured in a catalog. If you want, you can include more than one attribute and value pair in a single product association rule. For example, you could use these two associations to create a catalog for Company X laptops and Company Z workstations:

Condition 1: Product category = laptop and brand = Company X.

or

Condition 2: Product category = workstation and brand = Company Z.

Each condition in the rule involves an association between two values, a product category and a brand, which are joined together using the where clause operator *and.* However, the relationship between conditions is based on the where clause operator *or,* meaning that any product that satisfies either condition 1 or condition 2 appears in the catalog.

Note: The system interprets rule conditions that are defined on the same row or scroll to be joined by the *and* operator and conditions that are defined on different rows or scrolls to be joined by the *or* operator.

Security Memberships

In PeopleSoft CRM, you can control user access to catalogs by specifying security memberships.

Security memberships enable you to specify which users or groups of users can have access to certain catalogs. For example, a company can have a membership list called *Premier Customers* that includes all of the premier customers in their system and a catalog named *Premier Catalog* that is specially prepared for premier customers. By specifying the *Premier Customers* membership list in the catalog definition, the catalog can provide special pricing and recommendations exclusively for this group of users. Similarly, you can define a membership list that includes all customers who are in the electronics industry in the California region and associate the list with a catalog of electronic products that is specific to the California region.

Note: Users cannot access catalogs that are defined with a security membership of the object type *Role.* Security membership lists for catalogs must contain Security objects of the types *Customer* or *Person* for users to access the catalog.

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Related Links

"Defining Application Security" (Application Fundamentals)

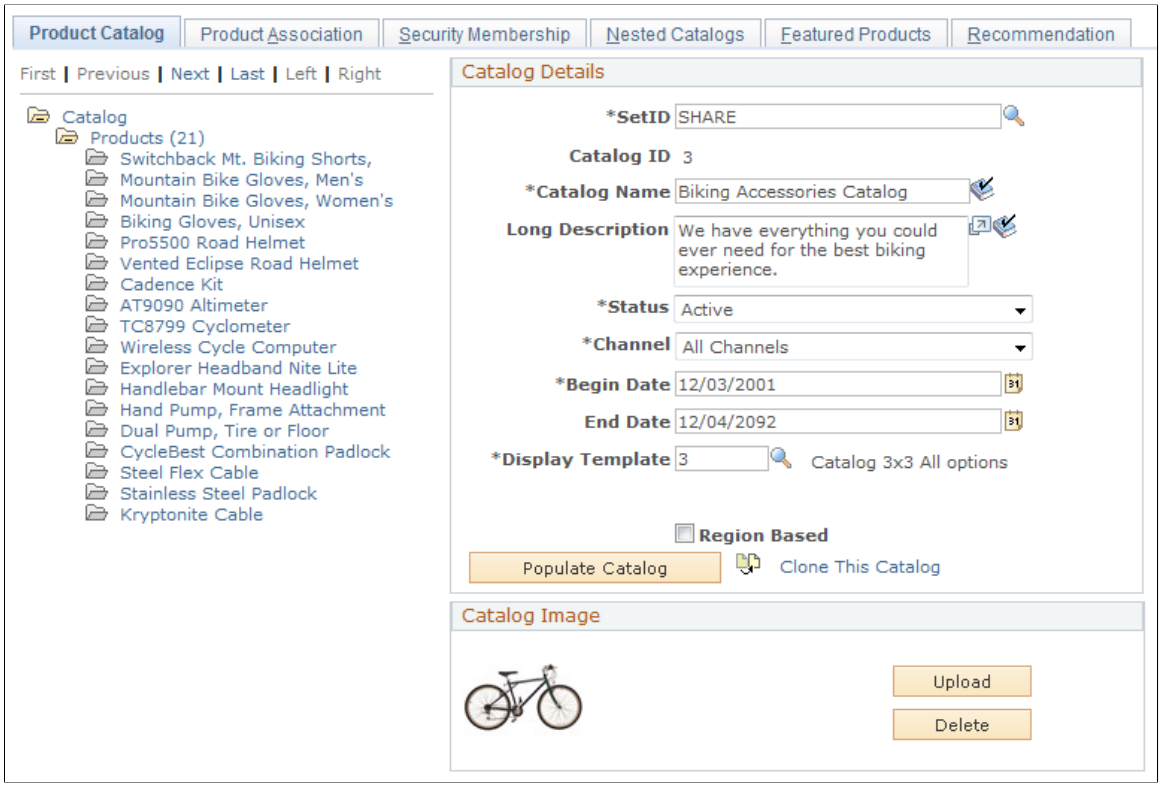
Product Catalog Page

Use the Product Catalog page (RO_PRD_CATALOG) to define catalog IDs and select default display templates to control the look and feel of catalogs; populate catalog cache tables.

Navigation:

Catalog Management CRM > **Catalog Definition** > **Product Catalog**

This example illustrates the fields and controls on the Product Catalog page.



Catalog Tree Details

You can expand folders in the catalog tree as follows:

- Expand the main Catalog folder in the catalog tree to display subfolders for products.
- Expand the Products folders to see individual products in the catalog.

Each folder in the tree has a link associated with it. Inside the Products folder are links for individual products:

- Clicking the **Catalog** link refreshes the tree display.
- Clicking the **Products** link accesses the Product Definition component and lets you define products (logged on users must have access to the product definition to do this).

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- Clicking the link of any individual product accesses the product definition of the selected product.

Catalog Details

Field or Control	*Description*
Catalog ID	If you are adding a new catalog, the system asks you to enter a **SetID** and **Catalog Identification Number** before you access this page. If the catalog number already exists, the system displays this message: *The value you tried to add already exists. Select it below if you'd like to update it, or specify a new value in the fields above.* To create a new catalog, enter a number in the **Catalog Identification Number** field that does not already exist. Catalogs do not use the PeopleSoft CRM autonumbering feature.
Catalog Name and **Long Description**	Enter a name for the catalog. This name will appear in the catalog list. You can make the description appear on the catalog display page by selecting **Show Long Description** on the Display Template page.
Channel	Select which channels to use to define access to catalogs. Values are: *All:* Select if the catalog will be accessed externally using the web as well as internally (for example, by CSRs). *Internal:* Select if the catalog is for internal use only. *Web SS* (web self-service): Select if the catalog is for external access using the web (for example, by customers who are purchasing products or services through a self-service transaction). **Note:** The channel that is being accessed depends on the portal that is being browsed. As delivered, the customer portal is considered external, and the employee portal is considered internal.
Begin Date and **End Date**	Enter dates that specify the period during which the catalog is active.

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Field or Control	*Description*
Display Template	Enter a display template to control the layout of products as well as the information and options that appear in the catalog. You can override the display template on the Security Membership page, per membership. **Note:** You must first define the display templates using the Catalog Template Setup component.
Region Based	Select if the catalog is regional (sensitive to the geographical area of the user). When users accesses regional catalogs, they are prompted for a region, which could be the zip code of the ship-to area of service or installation, a state, a city name, or some other location, depending on how you define regions during implementation. This information can be used to dynamically hide products in the catalog that are not available in a particular area. **Note:** To define the regions in which specific products are available or unavailable, use the Regions Page in the Product Definition component. Product Sales regions are used for product filtering. **Note:** You can also attach regional restrictions at the user level as opposed to the product level. Geographic regions are used for user associations. To enforce regional restrictions use the security membership setup. For example, a membership might include all customers in the *Southeast region*.
Populate Catalog	Click to populate cached information on which the tree in the left pane of the page is based. The tree refreshes automatically with the new information based on the catalog refresh. **Note:** This button calls the RO_CAT_PUSH1 Application Engine program, which populates the cache tables storing catalog data.
Clone This Catalog	Click to access the Clone a Catalog page and clone the current catalog.

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Catalog Image

Field or Control	*Description*
Upload	Click to upload an image to represent the catalog. You determine whether this image appears in online catalogs on the Display Template page.
Delete	Click to delete the image.

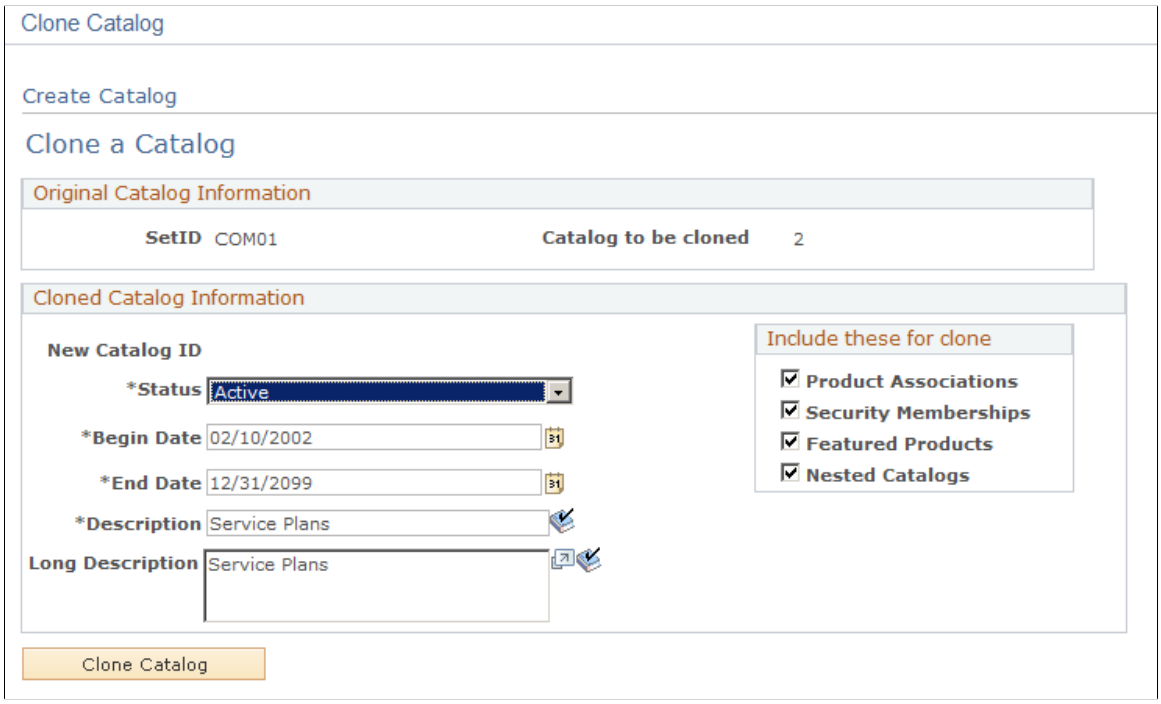
Clone a Catalog Page

Use the Clone a Catalog page (RO_CAT_CLONE) to create copies of catalogs.

Navigation:

Click the **Clone This Catalog** link on the Product Catalog page.

This example illustrates the fields and controls on the Clone a Catalog page.



Original Catalog Information

Field or Control	*Description*
Catalog to be cloned	Displays the name of the catalog that is being cloned.

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Cloned Catalog Information

Field or Control	*Description*
New Catalog ID	Displays the new ID that the system assigns to the cloned catalog once you click **Clone Catalog.**
Begin Date and **End Date**	Enter dates that specify the period during which the new catalog is active.
Description and **Long Description**	Enter a description, which appears in the catalog list. You can make the long description appear on the catalog display page by selecting **Show Long Description** on the Display Template page.

Include these for clone

Field or Control	*Description*
Product Associations	Select to save all of the product associations from the original catalog to the new catalog.
Security Memberships	Select to save all of selected membership lists from the original catalog to the new catalog.
Featured Products	Select to save all of the featured product rules from the original catalog to the new catalog.
Nested Catalogs	Select to save all of the nested catalogs from the original catalog to the new catalog.

Product Association Page

Use the Product Association page (RO_PRD_ASSOCIATION) to define catalog content by direct or business rule association.

Navigation:

Catalog Management CRM > **Catalog Definition** > **Product Association**

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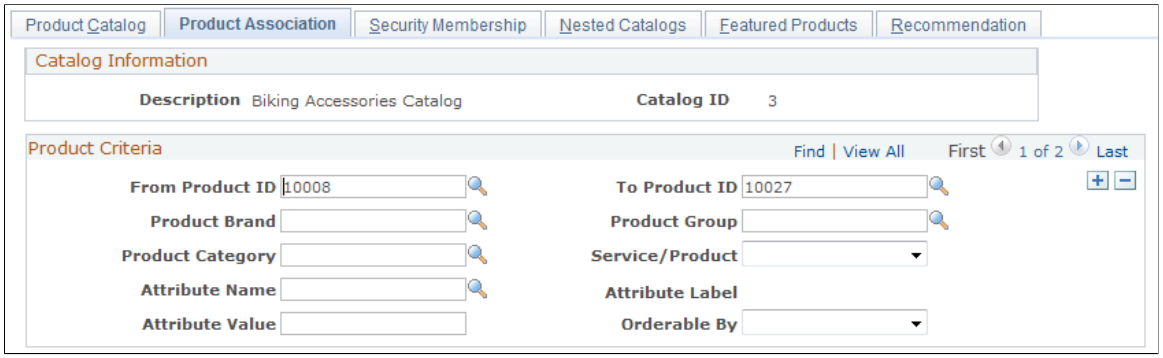
This example illustrates the fields and controls on the Product Association page.



Note: You should populate the catalog by clicking the **Populate Catalog** button on the Product Catalog page after defining product associations.

Field or Control	*Description*
From Product ID and **To Product ID**	Enter product IDs to link products to catalogs by direct association. To link an individual product rather than a range of products to a catalog, enter the specific product ID in the **From Product ID** field and leave the **To Product ID** field blank. Create new rows for each product or product range that you want to associate with the catalog.
Product Brand	Enter a brand to create a business rule association based on that brand. For example, you could select only Brand A product for inclusion in a catalog. **Note:** Define brands on the Product Brand page.
Product Category	Enter a product category to create a business rule association based on that category. For example, you could include in the catalog only products that fall within the category *Trains*. **Note:** Define product categories on the Product Category page.
Attribute Name and **Attribute Item**	Enter an attribute name on which to base a business rule association, and enter the attribute value. For example, you could use the *Material* attribute to select items for inclusion in a catalog and specify that you want to include all products in the product group *Shoes* that are made of 100 percent leather (in this case, the attribute value would be *Leather*). **Note:** Define attributes using the Attributes component. Only attributes that are associated with products are available here. Associate products with attributes on the Attributes page in the Define Products component.

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Field or Control	*Description*
Product Group	Enter a product group to create a business rule association based on that group. For example, you could include in the catalog all products in the product group *Dishwashers.* **Note:** Add products to product groups on the Product Groups page in the Product Definition component.
Service/Product	Enables you to create a business rule association based on the definition of products. Select *Product* as the value.
Attribute Label	Displays the description of the chosen attribute.
Orderable By	Select a value to create a business rule association based on whether a product is universally available or available only to businesses or consumers. For example, you may want the catalog to include only products selected for businesses. Values are: *All:* Select to include products in the catalog that are available to both customers and businesses. *Consumer:* Select to include products in the catalog that are available to consumers. *Business:* Select to include products in the catalog that are available to businesses. **Note:** Set the **Orderable By** status of products on the Definition page in the Product Definition component.

Conditional Clauses in Business Rule Associations

When you create business rule associations on the Product Association page, the conditions in the rule can be related to one another in one of two ways:

- Using *and* operators

  When conditions are joined by *and* operators, all individual conditions in the rule must be met before a product can be included in a catalog. For example, if you specify that the product brand *Company X* should be included in the catalog and that within this brand, only products in the product category *Laptop Computers* should be included, you are defining a rule based on an *and* operator. In this example, the product must be both a Company X brand and a laptop to be included in the catalog.

- Using *or* operators

  When conditions are joined by *or* operators, only one condition in the rule must be met before a product is included in a catalog. For example, if you specify that any product with the product brand *Company X* should be included in the catalog, as well as any computer in the product category *Workstation* (regardless of brand) should be included, you are defining a rule based on an *or* operator.

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In this example, if the product is either a Company X brand or a workstation, it will be included in the catalog (only one condition needs to be satisfied).

To associate conditions within a rule using the *and* operator, define all the conditions as part of the same scroll or row. For example, assume that you want to include only Company X workstations in a catalog. To do this, enter a product brand of *Company X* (condition 1) and a product category of *Workstation* (condition 2), but do not create a new row for each condition.

To associate conditions using the *or* operator, define each condition on a different scroll or row. For example, assume that you want to include all Company X products in the catalog (condition 1), as well as any workstation, regardless of brand name (condition 2). To do this, enter a product brand of *Company X,* create a new row on the Product Association page (click the **Add Row** button), and define the second condition by enter a product category of *Workstation.*

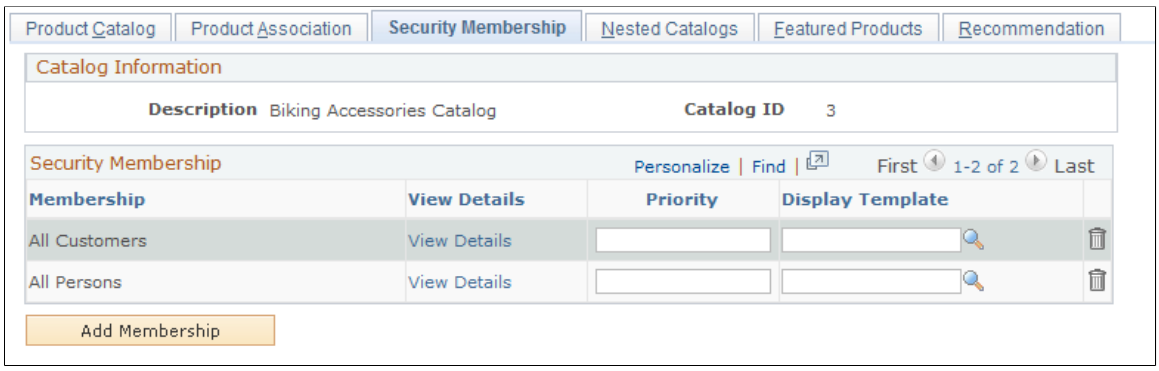
Security Membership Page

Use the Security Membership page (RO_CAT_SEC) to define user access and experience by defining membership lists.

Navigation:

Catalog Management CRM > **Catalog Definition** > **Security Membership**

This example illustrates the fields and controls on the Security Membership page.



Note: If you do not define a membership list, no one will have access to the catalog.

Field or Control	*Description*
Membership	Displays membership lists that are associated with a particular catalog.
View Details	Select to view the membership details.

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Field or Control	*Description*
Priority	Enter a number to indicate the order or priority in which you want the display templates to appear. For example, if display templates were defined for three different membership lists and a user belonged to more than one membership list, then the number you enter in this field would determine which display template an agent would use in conjunction with the catalog.
Display Template	Enter a display template to override the default template that is selected at the catalog level (on the Product Catalog page). This template applies to users who meet the access requirements that you define.
Add Membership	Select to add a new membership to the catalog security.

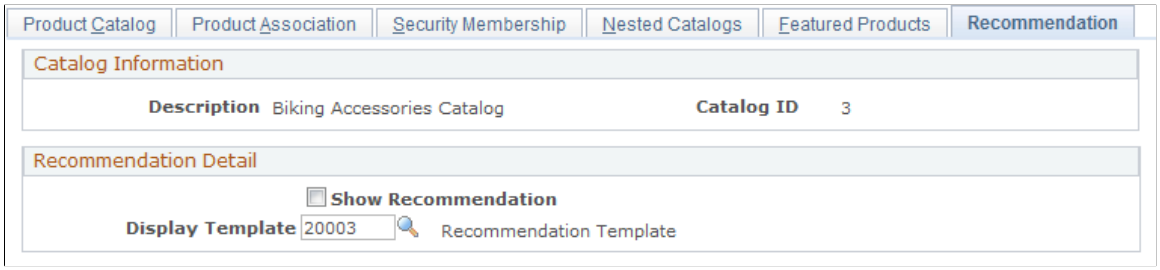
Recommendation Page

Use the Recommendation page (RO_RECOMMENDATION) to select to show or not show recommendations.

Navigation:

Catalog Management CRM > **Catalog Definition** > **Recommendation**

This example illustrates the fields and controls on the Recommendation page.



Recommendation Detail

Field or Control	*Description*
Show Recommendation	Select to show recommendations at runtime when users are looking for products on the Find Products page.
Display Template	Select a display template to be used for presenting recommendations.

Related Links

"Understanding Display Templates" (Automation and Configuration Tools)
"Selecting Products" (PeopleSoft Order Capture Applications)

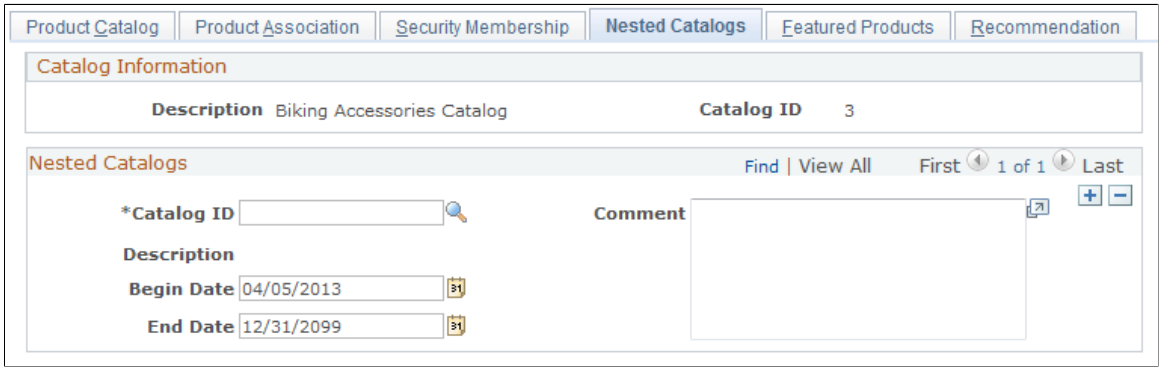
Nested Catalogs Page

Use the Nested Catalogs page (RO_NEST_CAT) to link nested catalogs to a main catalog.

Navigation:

Catalog Management CRM > **Catalog Definition** > **Nested Catalogs**

This example illustrates the fields and controls on the Nested Catalogs page.



Field or Control	*Description*
Catalog ID	Enter the ID of the catalog that you want to nest within the main catalog that appears at the top of the page.
Begin Date and **End Date**	Enter the dates for which the relationship between the nested catalog and the main catalog is valid.

Featured Products Page

Use the Featured Products page (RO_FEATURED_PRD) to select products to be featured in catalogs.

Navigation:

Catalog Management CRM > **Catalog Definition** > **Featured Products**

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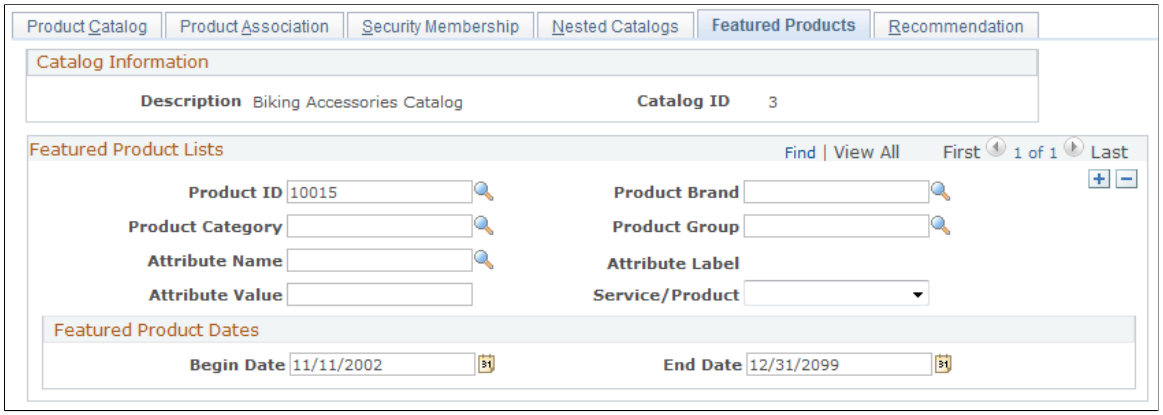
This example illustrates the fields and controls on the Featured Products page.



Note: A product cannot be featured in a catalog until you associate it with the catalog on the Product Association page. Only after you establish the association can you mark the product as *Featured.*

Featured Product Lists

Field or Control	*Description*
Product ID	Enter a product ID to define that individual product as a featured product. Create a new row for each product that you want to feature.
Product Category	Enter a product category to create a business for featuring products based on that category. **Note:** Define product categories on the Product Category page.
Attribute Name and **Attribute Value**	Enter an attribute name on which to base the business rule, and enter the attribute value. For example, *Material* is an attribute that you could use to define featured items; you could specify that you want to feature all products in the product group *Shoes* that are made of 100 percent leather (in this case, the attribute value would be *Leather*). **Note:** Define attributes using the Attributes component. Only attributes that are associated with products whose group usage type is *Information* are available here. **Note:** Associate products with attributes on the Attributes page in the Define Products component.

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Field or Control	*Description*
Product Brand	Enter a brand to create a business rule for featuring products based on that brand. For example, you could select all NIKE, Inc. products as featured products. **Note:** Define brands on the Product Brand page.
Product Group	Enter a product group to create a business rule for featuring products based on that group. **Note:** Add products to product groups on the Product Groups page in the Product Definition component.
Attribute Label	Displays the description of the chosen attribute.
Service/Product	Enables you to define a business rule for featuring products based on the definition of products. Select *Product* as the value.

Searching Catalogs

This section provides an overview of product searches and discusses how to search products.

Page Used to Search Catalogs

Page Name	*Definition Name*	*Usage*
Find Products Page	RX_PROD_SRCH	Search products in one or more catalogs.

Understanding Product Searches

You can initiate product searches and access product data from different locations in PeopleSoft CRM:

- Self-service users can run searches by clicking the **Find Product** or the Shopping Cart link.
- CSRs can launch a catalog search by navigating to **Orders and Quotes** > **Find Products** on the main menu.
- Employee or customer users can personalize the PeopleSoft CRM portal content by adding the Catalog Search pagelet to their home page (if the PeopleSoft Portal Pack is installed).
- In PeopleSoft Order Capture, CSRs can access product data and run catalog searches from the Entry form to obtain up-to-date information about products before they enter an order or a quote.

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CSRs can copy products from the search results back to PeopleSoft Order Capture.

- In PeopleSoft Order Capture Self Service, you can link to product detail pages from order lines and access product catalogs..
- From Lead and Opportunity components in PeopleSoft Sales, sales representatives can navigate to the Products section on the Propose page and perform keyword searches in catalogs for products.

  Users can then use the product comparison tool to access product details and copy products from the search results back to PeopleSoft Sales.

Product Search Setup

PeopleSoft CRM uses PeopleSoft Search to process product searches at runtime. When the process to build the product catalog search index is invoked, the AE program generates an XML feed using the information provided and creates a schedule in the search engine, which crawls the feed and builds the index. The index contains data from the same database cache tables that were loaded when you built and populated the catalog. Before you can search a catalog, you must first populate the catalog cache tables after making changes to product catalogs. This is done by clicking the **Populate Catalog** button on Product Catalog page for any new and updated catalog. Then, run the process to build the product catalog search index.

See “Understanding PeopleSoft Search Framework Definitions for CRM” (Automation and Configuration Tools).

Search Results

When search results are returned, the user can navigate into product details and compare up to three products. If the product search is performed in the agent-facing Order Capture application, or PeopleSoft Sales, users can select products in the search results and copy them back into the calling component.

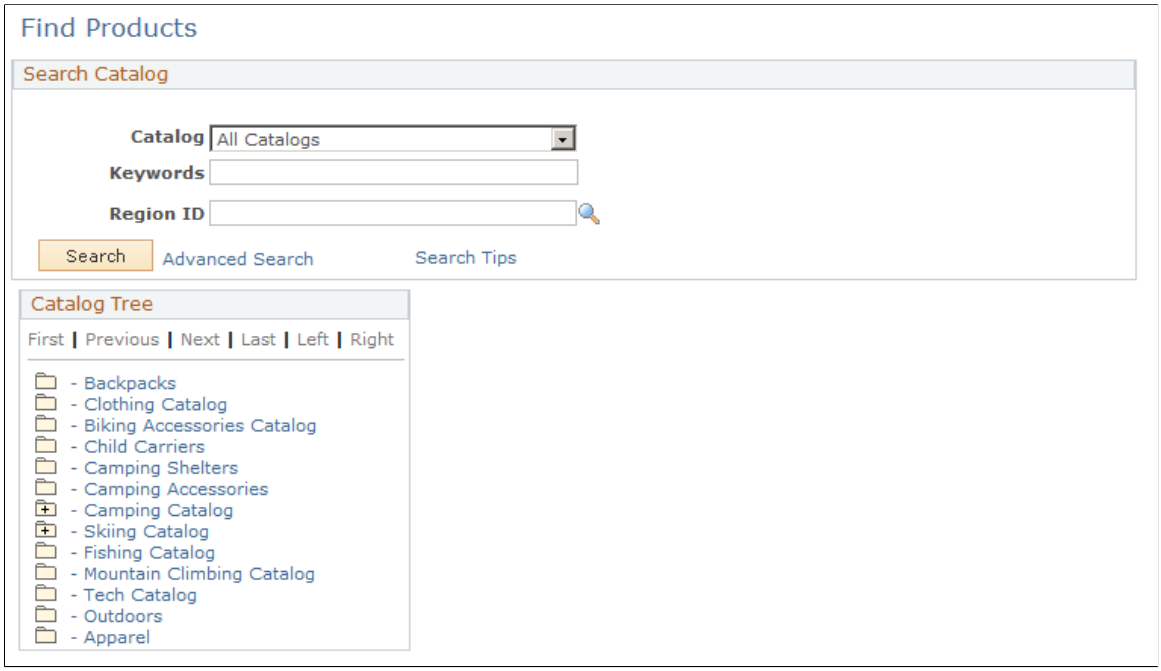
Find Products Page

Use the Find Products page (RX_PROD_SRCH) to search products in one or more catalogs.

Navigation:

Orders and Quotes > **Find Products** > **Find Products**

This example illustrates the fields and controls on the Find Products page.



Basic Search

A basic search enables you to search catalogs based on selection criteria that you enter in the **Catalog, Keywords,** and **Region ID** fields.

Field or Control	*Description*
Catalog	Select the name of the specific catalog that you want to search, or select *All Catalogs* to run a global search.
Keywords	Enter the keyword or keywords to use in the search. The search looks only in the catalog that you select (or in all catalogs) and looks for keywords across all fields in the search index. **Note:** If you enter multiple keywords, the search treats these as an exact phrase. For example, if you enter *red bike,* the search would not find *blue bike with red trim.* If you want the search to treat multiple keywords independently, you must separate them with a Boolean operator such as *and* or *or.* For example, to find all occurrences of *red* and *bike,* enter *red and bike* in the **Keywords** field. Conversely, to find all occurrences of *red* or *bike,* enter *red or bike* in the **Keywords** field.
Region ID	Select a Region ID to narrow the search criteria.

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Field or Control	*Description*
Search	Click the **Search** button to initiate a search. **Note:** Pressing the Enter key after entering a keyword will not initiate the search.
Search Tips	Click to get tips on how to narrow or broaden the searches using the **Keywords** field or to get tips on advanced searches.

Advanced Search

Advanced searches enable you to enter the same search criteria as in a basic search and more.

Field or Control	*Description*
Description	Enter a keyword to search only the description field for this value.
Product ID	Enter a complete ID to search only the product ID field for this value.
Brand	Select a brand to search only the product brand field for this value.
Match On	Select the relationship between the elements of the advanced search. Values are: *All Criteria (AND):* Select to relate advanced search criteria to one another using the *and* operator. All of the search criteria that you define (description, product ID, and brand) must be satisfied for the search to return a product. *Any Criterion (OR):* Select to relate advanced search criteria to one another using the *or* operator. Only one of the search criteria that you define (description, product ID, or brand) must be satisfied for the search to return a product. **Note: Match On** options apply only to advanced search criteria. The elements of a basic search (catalog and keyword) are always linked together by an *and* operator. Similarly, the relationship between basic and advanced search elements is always based on the *and* operator.

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Field or Control	*Description*
Search	Click to initiate a search. **Note:** Pressing Enter after entering a keyword does not initiate the search.

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Chapter 10

Tracking Installed Products

Understanding Installed Products

This section discusses:

- How installed products are used.
- How installed products are created and updated.
- System-created service orders for installed products.
- Warranty activation on installed products.
- Hierarchical views of installed products.
- Use of display templates in the installed product component.

How Installed Products Are Used

Installed products track the products (standard products or product packages) that are installed at a customer's site or issued to an internal worker. In PeopleSoft Support and PeopleSoft Integrated FieldService, you specify installed products in agreement lines to control the availability of these lines to the specific set of products. Installed products determine whether warranties are involved in the entitlement search when installed products are referenced on cases or service orders. Agents can reference installed products (assets) that are defined in PeopleSoft HelpDesk to determine what equipment is issued to an employee and the location of the equipment.

How Installed Products Are Created and Updated

You can manually create and maintain installed products for most products that are listed in the system using the Installed Products component. Use the Product Definition - Installed Product page to define rules that govern when installed products are automatically created and updated.

You can configure the system to create installed products or update the status of installed products when:

- Orders are placed using PeopleSoft Order Capture or PeopleSoft Order Capture Self Service.
- The CRM system receives automatic shipping notification (ASN) messages from another system, such as PeopleSoft Order Management.
- Material usage and removal transactions are recorded using the Service Order component in PeopleSoft Integrated FieldService.

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Note: The system automatically creates installed products with the status of *Installed* for products that are newly registered using the Product Registration component. For registered products that already have installed products, the system does not update the installed product status. Based on how the administrator configures the Product Registration page (for example, what fields are available and whether they are editable), users can update installed products as they complete the registration.

At the installation level, you can define two sets of installed product creation and update rules that the system uses as default values for the Product Definition - Installed Product page: one set for those products that require a service order for installation and another set for those that do not. At the product definition level, however, you can have only one set of rules

When you set up these rules for installed products using the Product Definition component, you can click the **Apply Defaults** button on the Installed Product page to populate the appropriate default rules. While you can modify the default rules for specific products, you can also update the configurable default values (used across all products) on the Installed Product Defaults page under **Set Up CRM** > **Install** > **Product Options.**

See “Setting Up Product Registration” (Application Fundamentals).

See “Registering Products” (Application Fundamentals).

See Defining Creation and Update Rules for Installed Products.

Rules for Installed Product Status

You can configure the system to set the status of installed products that it creates or updates to one of three values: *Pending, Installed,* or *Shipped.* Typically, implementations suggest these rules, but you can configure them for your own business processes.

For a product that requires a service order for installation:

- When the installed product is created after submitting an order, set the status to *Pending.*

  If a subsequent ASN message is received, update the status to *Shipped.*

- When the installed product is created as a result of the receipt of an ASN message, set the status to *Shipped.*

- When a material usage transaction (recorded on the Order Materials component) results in a creation or update of the installed product, set the status to *Installed.*

For a product that does not require a service order for installation:

- When the installed product is created on order capture, set the status to *Pending.*

  If a subsequent ASN message is received, update the status to *Installed.*

- When the installed product is created as a result of the receipt of an ASN message, set the status to *Installed.*

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Note: If a product does not require a service order for installation and a rule has been established for ASN receipt that sets the status to a value other than *Installed,* you must manually set the status of the installed product to *Installed* when appropriate.
You may want to set up rules that require manual intervention for business processes that require an action or response from a customer. For example, suppose that you ship a product that requires some type of installation, such as setting up a personal computer that the customer performs. When the customer completes the installation process, he or she can contact you to update the record.

See Also *PeopleSoft FSCM Order Management*

Related Links

Managing Product Relationships

"Understanding Order Capture" (PeopleSoft Order Capture Applications)

"Setting Up the Order Materials Component" (PeopleSoft Integrated FieldService)

System-Created Service Orders for Installed Products

When defining products using the Product Definition component, you can indicate whether an installed product requires a service order to complete installation. When a user places an order for the installed product in PeopleSoft Order Capture or Order Capture Self Service, component interfaces enable the system to stage a service order for the specified installation service in PeopleSoft Integrated FieldService.

When the status of the installed product or group of records that is associated with the ordered product is updated to *Shipped* (that is, when the ASN shows that the corresponding order line has been completely fulfilled), the system automatically generates a service order using the information that is defined for the specified installation service.

The initial status of the system-created service order is *Open,* with all associated service order activities set to *Open - Hold Assignment.*

If you enable automatic technician assignment and the system has successfully assigned a provider group and group member to the service order, the status of service order activities that are assigned with technicians is set to *Open - Assigned.*

When an order for multiple installed products that require installation is saved in PeopleSoft Order Capture or Order Capture Self Service, the system creates one service order for each product-site combination on the order.

Related Links

"Understanding Order Capture Business Projects" (PeopleSoft Order Capture Applications)

"Understanding Service Orders" (PeopleSoft Integrated FieldService)

Warranty Activation on Installed Products

You can define or update warranties using the Warranties component under **Customer Contracts CRM > Agreements.** Associate an item with a warranty on the Item Definition page under the **Items CRM > Inventory Item Definition.**

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When a user creates a case or service order for a customer's installed product, the system first checks for entitlements that are associated with a valid warranty on the customer's installed product before searching for entitlements on an agreement.

When you create an installed product using an item that is associated with a warranty, the system activates the associated warranty and calculates the warranty duration using information from both the warranty and installed product.

Note: The system can calculate the warranty duration for an installed product only if the appropriate process updated the base date that is used to calculate the warranty's start date.
For example, suppose that the warranty is defined to start upon shipment but no ASN (shipment) status update rules are defined for the product. In this case, the installed product is created at order time, with an order date but no shipment date. The warranty is associated with the installed product at order time, but no warranty dates are populated.
In this scenario, a user must manually update the installed product's warranty start and end dates for the warranty information to appear in entitlement matches. However, if the product has ASN status update rules defined, the system automatically records the ship date and the warranty start and end dates on the installed product as soon as the ASN is processed for the product.

If necessary, you can manually update the warranty status and coverage period on the installed product using the Installed Products component.

Related Links

“Understanding Agreements and Warranties” (Application Fundamentals)

Hierarchical Views of Installed Products

In PeopleSoft CRM, you can establish parent-child relationships between installed products and display them graphically from several points in the system. This functionality can be implemented to support a wide range of business needs, including the ability to view the associated parent assembly or subcomponents for a given installed product, view the geographic locations of specific network components, or view the components of a customer's service package.

Hierarchical Relationship Creation

You can manually define relationships between installed products using the Installed Products component. For a given installed product, you specify the installed product of the parent product to establish a parent-child relationship. When two installed products reference the same parent record the system creates sibling relationships.

The system automatically defines the relationships for installed products that are created when product packages are ordered in PeopleSoft Order Capture or Order Capture Self Service. The system automatically defines relationships for orders of static kits that originate in PeopleSoft Order Management.

For both package and static kit orders, the system creates installed products for each of the products in the package or static kit that are defined as installed products. If a product in a package or static kit is not defined as an installed product, the installed product hierarchy does not display that product.

For example, suppose that a parent product is defined as an installed product, the child product is not, and the grandchild product is. When the package is ordered, the system creates records for only the parent and grandchild rows and establishes a parent-child relationship between them.

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How Hierarchical Relationships Are Viewed

Once you define the appropriate relationships, users can view them graphically in a tree format by accessing the Installed Product Hierarchy page. In PeopleSoft CRM, you can access this page from pages and page toolbars in these components:

- Installed Product
- Service Order
- My Service Order
- Support Case
- HelpDesk Case
- RMA (return material authorization) Form
- Site (under Customers CRM)
- Product Registration Installed Assets
- Installed Products (search) page
- Installed Assets (search) page
- Customer 360 Degree View
- Worker 360 Degree View
- Order Capture Entry
- Self-Service Support Case
- Self-Service HelpDesk Case

Note: For cases that you access from the corresponding Case components, the **View Hierarchy** button (which you click to access the Installed Product Viewable Hierarchy page) is not available if the business units to which they belong are associated with call center configuration templates that are set to hide installed product information.

The system filters the installed products that appear in the viewable hierarchy using the name of the customer or internal worker, site, product, and department values that are available on the page from which you accessed the viewable hierarchy.

For example, if you access the viewable hierarchy from a page where customer and site fields have values, the system returns all of the installed products for the specified customer and site. If you access the viewable hierarchy from a page where the customer and product fields have values, the system displays all of the installed products for the specified customer and product.

This table summarizes the installed products that are returned for specific field values:

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Field Value on Source Page	*Installed Products Returned*
Site	All installed products for the specified customer or internal worker and site plus any related parent, sibling, or child installed products. **Note:** Not valid for PeopleSoft HelpDesk.
Product	All installed products for the specified customer or internal worker and product ID plus any related parent, sibling, or child installed products.
Department	All installed products that match the specified customer or internal worker and department plus any related parent, sibling, or child installed products.

On the Installed Product Hierarchy page, the system lists the filter criteria values that are used to select which installed products to display. Initially, the system displays all records for all statuses. By default, the system also displays the immediate family relationships—parent, sibling, or child—for each installed product that is returned. You can modify the initial display to view records that match a specific status. You can also elect to filter the family relationships and view only those records that meet the filter criteria on the source page.

Additional runtime filters, other than Status as mentioned previously, exist. Installed Product ID and Product are always shown, whereas the other filters are configurable using the Tree Set Up component.

These filters include:

- Installed Product ID
- Product
- Site
- Department
- Status

Related Links

Managing Product Relationships

Use of Display Templates in the Installed Product Component

The Installed Product component (RF_INST_PRODUCT) supports the use of display templates in controlling its appearance and behavior for a variety of business needs. At the setID level, you can specify a display template for each of the installed product types (that is, installed product and installed asset), which is used to control, among other things, the visibility of pages, sections, fields and labels of the component.

Related Links

Configuration Options Page

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“Understanding Display Templates” (Automation and Configuration Tools)

Understanding Installed Assets

This section discusses:

- How the CRM installed asset table is updated.
- How new assets in PeopleSoft Financials Management System, FMS, are identified in CRM.

How the CRM Installed Asset Table is Updated

Installed assets may be manually entered directly into the system using the Installed Assets page. For customers using PeopleSoft FMS, installed asset entries may be initially created by a full synchronization to the FMS asset repository data. All FMS entries of Asset_Type 010 (IT-Hardware) are added to the data on the CRM-installed asset table. Subsequent additions and updates to the FMS asset repository data for Asset_Type 010 entries are sent to CRM for incremental synchronization.

Before running the full Asset synchronization, you need to run these full synchronizations from FMS to CRM:

- Asset Subtype
- Manufacturer
- Location
- Department
- Employee

Performing these synchronizations ensures that the values used in the asset entries for the tables listed previously will exist in the system. This action helps prevent *Invalid Entry* problems when viewing the installed asset data.

This preparation also ensures that the relevant data referred to on FMS assets (customer, department, manufacturer, and so on) has corresponding entries on the CRM side. Without the corresponding data on the CRM side, the full synchronization may attempt to create a CRM-installed asset for an employee who does not exist in CRM. If you attempt to create an installed asset this way, the system displays an error message.

How New Assets in PeopleSoft Financials are Identified in CRM

When asset data is sent from FMS to CRM, the CRM-installed asset table is updated like this:

Positive Matches

- If a match exists on the business unit and asset ID between the FMS data and the CRM data, the CRM data for that row is updated with all the values from FMS.

  This action may occur when data for an asset has previously been received from FMS by CRM and a change is subsequently saved and published by FMS.

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- If a match exists on the installed product ID between the FMS data and the CRM data, the CRM data for that row is updated with all the values from FMS.

  This action may occur when data for an asset was created by CRM and sent to FMS, and a change is subsequently saved and published by FMS. In this case, the corresponding CRM entry would have the same installed product ID (INST_PROD_ID) but would still have no values for the business unit and asset ID.

- If a match exists on the serial ID but not the business unit or asset ID, the CRM data for that row is updated with all the values from FMS.

  This action may occur if data for the same asset has been entered independently in both FMS and CRM.

Note: If data for the same asset has been entered in FMS and CRM in a previous release, the FMS entry will not initially have the key fields for the corresponding CRM entry, and the CRM entry will not initially have the key fields for the corresponding FMS entry. However, if both entries refer to the same serial ID, it can be assumed that they refer to the same actual asset.

Assumed Positive Matches

- Asset Tag

  If a match exists between FMS and CRM based on identical non-null values for asset tag and product and if a blank value exists for business unit, asset ID, and serial ID on the CRM side, then the CRM data for that row will be updated with all the values from FMS. This action applies in situations where data for the same actual assets already exists in FMS and CRM but the only value on the CRM side is an asset tag rather than a serial ID. In this case, an update from FMS needs to be matched against the corresponding CRM entry.

- Employee and Product

  If a single matching row exists between FMS and CRM based on identical non-null values for employee ID and product ID and if a blank value exists for business unit, asset ID, and serial ID on the CRM side, then the CRM data for that row is updated with all the values from FMS. This action applies in situations where data for the same actual assets already exists in FMS and CRM and the only value on the CRM side is an asset tag rather than a serial ID. In this case an update from FMS needs to be matched against the corresponding CRM entry

  If a single entry in CRM matches the assigned employee and product, the system assumes it refers to the same actual asset and the CRM entry is updated.

- Department and Product

  If a single matching row exists between FMS and CRM based on identical non-null values for department ID and product ID and if a blank value exists for seriaI ID on the CRM side, the CRM data for that row is updated with all the values from FMS. This action applies in situations where data for the same actual assets already exists in FMS and CRM and the only value on the CRM side is an asset tag rather than a serial ID. In this case, an update from FMS needs to be matched to the corresponding CRM entry.

  If a single entry in CRM matches the assigned department and product, the system assumes it refers to the same actual asset and the CRM entry is updated.

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Ambiguous Matches

In all other cases for which the system cannot unequivocally determine that the asset is definitely the same or definitely different on both systems, the data for that row is sent to a reconciliation table that a user may access online.

This case should apply in situations for which data for the same actual assets may exist in FMS and CRM, when the only value on the CRM side is an asset tag rather than a serial ID; but for which the lack of matching unique identifiers or the presence of multiple potential matches prevents a positive match.

In this case, the user needs to determine if an update or an add is required on the CRM side to reconcile the data from FMS.

The online page lists all the rows of data that require reconciliation with CRM entries. You can open each entry to see the possible matches with existing CRM installed assets based on the matches on the product ID and one or more of these fields: Employee ID, Department ID, and Location. Drilling in on the first entry on the screen presents the user with all possible matches.

This detail page shows all possible matching CRM entries and provide an action button to process any of these rows. The **Merge Selected Installed Asset** link allows you to:

- Confirm that the row for that CRM entry refers to the same actual asset as the data from FMS.
- Update the CRM data with all the values from the FMS system.

After identifying the desired row and clicking the **Merge Selected Installed Asset** link, the data from the FMS asset is used to update the selected CRM asset. The system then returns to the first screen, which shows all unreconciled FMS asset records.

The **Create New Installed Asset** button allows the user to specify that the FMS data does not refer to any asset on the CRM side. It also creates a new CRM installed asset row based on the values from the FMS row.

Understanding Hardware Asset Information Mapping and Reconciliation

This section discusses:

- Product mapping for hardware assets.
- Reconciling asset information and defaults.

Product Mapping for Hardware Assets

The CRM Installed Product table requires a product ID for every installed asset. This enables users to see the kind of asset that is being referred to in the system. Since neither the product ID nor inventory item ID are required for entries in the FMS asset table, it is important that the CRM-installed product table entries are assigned a product ID based on the following options:

- If the FMS asset table entry has an entry for the product ID, the system uses it to check the corresponding inventory item ID.

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If more than one inventory item ID is found, the system uses the first inventory item ID when creating the CRM installed product entry.

- If the FMS asset table entry has no entry for the inventory item ID, the product ID is assigned to the CRM installed product entry based on a mapping table that is defined at setup (installation) by the user to map certain fields from the FMS system to the equivalent product ID's that you set up on the CRM system.

  To go to this page, click **Set Up CRM** > **Common Objects** > **Integration Rules** > **Integration Defaults** > **Asset Product Mapping.** The search page enables the user to open the page for the desired setID value of the Product table to which the user is mapping entries.

This system was designed to create a distinct product that will be mapped to each combination of asset subtype, manufacturer, and model that is expected to be present in the list of assets that is returned from FMS, including the discovery process that is run on FMS. The system allows a product to be associated with each type of asset. When receiving information about a new asset from FMS, CRM checks the mapping table to see if a match exists on non-null values for the asset subtype, manufacturer, and model fields.

If a match exists, the system uses the corresponding product from the mapping table to create the new installed asset in CRM. If no match is found on the three fields, a match is attempted on the asset subtype and manufacturer. If a match is found, the corresponding product ID is used. If no match is found on these two fields, a match is attempted only on asset subtype. If no match is found on this field, a match is attempted just on blank values for asset subtype, manufacturer, and model. This type of row corresponds to a default product ID.

Note: A SaveEdit error on the mapping page requires a value for manufacturer if a value for model is present on that row. In addition, this SaveEdit error requires that the user enter a single default value specifying a product that should be used when no other match applies. This entry ensures that we can always map a product to any entry that comes from FMS.

As mentioned previously, you could set up your system so that the assets sent from FMS (asset type of IT-Hardware) have values for asset subtype, manufacturer, and model, and ensure that each of these combinations is mapped to a distinct product on the mapping page. This setup would involve setting up the appropriate asset subtypes and profiles on the FMS side and the appropriate products and product mapping setup page on the CRM side. Providing a default product ID as described previously ensures that a product ID can always be found for use in the CRM installed product table. This default is required since the CRM installed product table requires a product ID value for each of its entries.

Note: Before adding data to the Product Mapping page, you must run the Manufacturer_Fullsync and Copy_AM_Subtype full synchronizations.

Reconciling Asset Information and Defaults

If the system cannot determine if the asset is the same on both the CRM and FMS databases, use the Asset Reconciliation page to reconcile or add asset information.

The system checks the mapping table first to determine the product ID since a default product ID should always exist for use in the mapping table even when no matches occur on the asset subtype, manufacturer, and model data. If no mapping table entry is found, the system derives the product ID from the item ID,

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which means that the item ID would be used only in cases when no mapping table exists for the setID. Not having a mapping table for the setID, however, would constitute an erroneous data setup.

Defining Creation and Update Rules for Installed Products

To define creation and updates rules for installed products, use the Product Installation (PROD_INSTALLATION) component.

Pages Used to Define Creation and Update Rules for Installed Products

Page Name	*Definition Name*	*Usage*
Installed Product Defaults Page	RF_INSTPRD_DFLT	Specify default rule sets that determine how system transactions create and update installed products. On the Product Definition - Installed Product page, you can click a button to populate the appropriate default rule set and modify the rules for specific products, as necessary.
Product Definition - Installed Product Page	PROD_INSTALL	Specify rule sets that determine how system transactions create and update installed products for specified products.

Installed Product Defaults Page

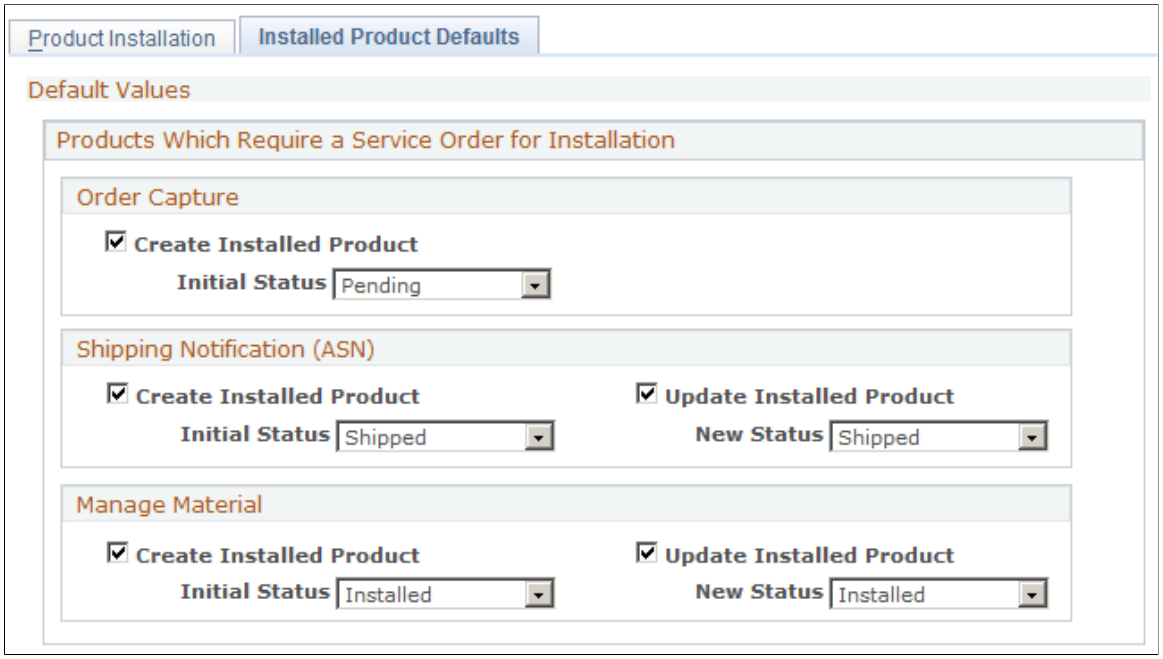
Use the Installed Product Defaults page (RF_INSTPRD_DFLT) to specify default rule sets that determine how system transactions create and update installed products.

On the Product Definition - Installed Product page, you can click a button to populate the appropriate default rule set and modify the rules for specific products, as necessary.

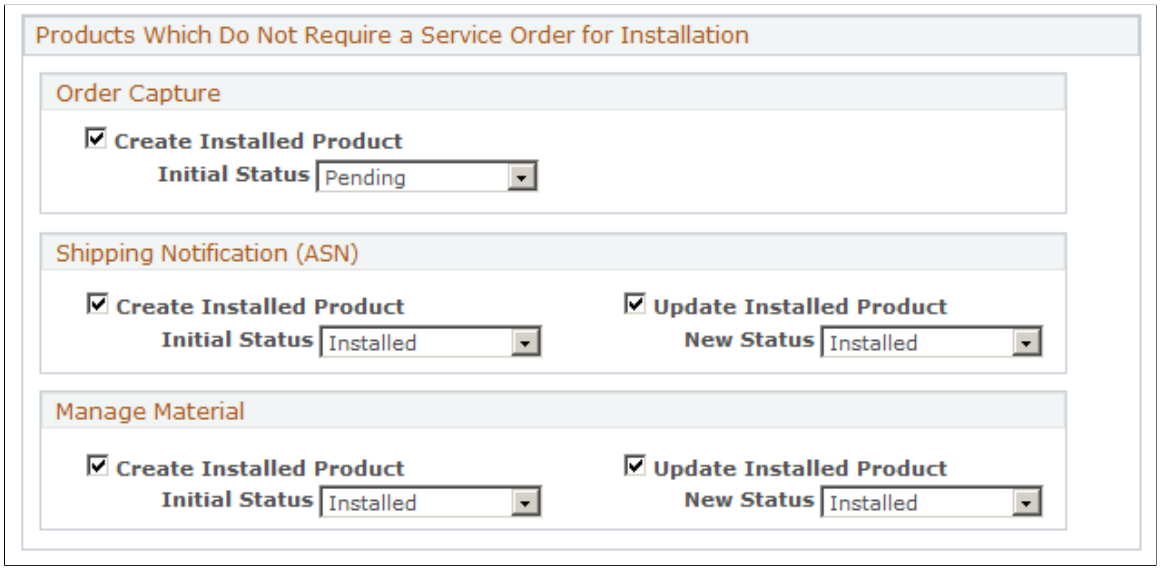
Navigation:

Set Up CRM > **Install** > **Product Options** > **Installed Product Defaults**

This example illustrates the fields and controls on the Installed Product Defaults page (1 of 2).



This example illustrates the fields and controls on the Installed Product Defaults page (2 of 2).



Products Which Require a Service Order for Installation

Field or Control	*Description*
Order Capture	If you want the system to create installed products when an order for the product is saved in PeopleSoft Order Capture or Order Capture Self Service, select the **Create Installed Product** check box and then select an initial status of *Pending, Installed,* or *Shipped* for the installed product.

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Field or Control	*Description*
Shipping Notification (ASN)	If you want the system to create installed products when an ASN message for the order is received, select the **Create Installed Product** check box and then select the initial status of the installed product. If the system should update existing installed products when an ASN message for the order is received, select the **Update Installed Product** check box and select the new status of the installed product. You can select both check boxes with appropriate statuses to enable the rule sets for creating and updating installed products. **Note:** For products that require a service order for installation, you cannot define rules that enable the installed product status to be set to *Installed* when an order is captured or an ASN is received.
Manage Material	If you want the system to create installed products when material usage and removal is recorded using the Order Materials component in PeopleSoft Integrated FieldService, select the **Create Installed Product** check box and then select the initial status of the installed product. If the system should update existing installed products when material usage and removal is recorded using the Order Materials component, select the **Update Installed Product** check box and then select the new status of the installed product. You can select both check boxes with appropriate statuses to enable the rule sets for creating and updating installed products.

Products Which Do Not Require a Service Order for Installation

Field or Control	*Description*
Order Capture	If the product does not require a service order for installation, and the installed product is created when an order for the product is saved in PeopleSoft Order Capture or Order Capture Self Service, select the **Create Installed Product** check box and then select an initial status. PeopleSoft suggests that you set the initial status to *Pending*.

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Field or Control	*Description*
Shipping Notification (ASN)	If the system receives a subsequent ASN message for a product does not require a service order for installation, select the **Create Installed Product** check box and then select the initial status of *Installed.* If the system should update existing installed products when an ASN message for the order is received for a product that does not require a service order for installation, select the **Update Installed Product** check box and then select a new status. PeopleSoft suggests that you set the new status to *Installed.* You can select both check boxes with appropriate statuses to enable the rule sets for creating and updating installed products. **Note:** If a product does not require a service order for installation and a rule has been established for ASN receipt that sets the status to a value other than *Installed,* you must manually set the status of the installed product to *Installed* when appropriate. You may want to set up rules that require manual intervention for business processes that require an action or response from a customer. For example, suppose that you ship a product that requires some type of installation, such as setting up a personal computer, that the customer performs. When the customer completes the installation process, he or she can contact you to update the record.
Manage Material	If the product does not require a service order when material usage and removal is recorded using the Order Materials component in PeopleSoft Integrated FieldService, select the **Create Installed Product** check box and then select the initial status of *Installed.* If the system should update existing installed products when material usage and removal is recorded using the Order Materials component in PeopleSoft Integrated FieldService for a product that does not require a service order for installation, select the **Update Installed Product** check box and then select a new status. You should set the new status to *Installed.*

Product Definition - Installed Product Page

Use the Product Definition - Installed Product page (PROD_INSTALL) to specify rule sets that determine how system transactions create and update installed products for specified products.

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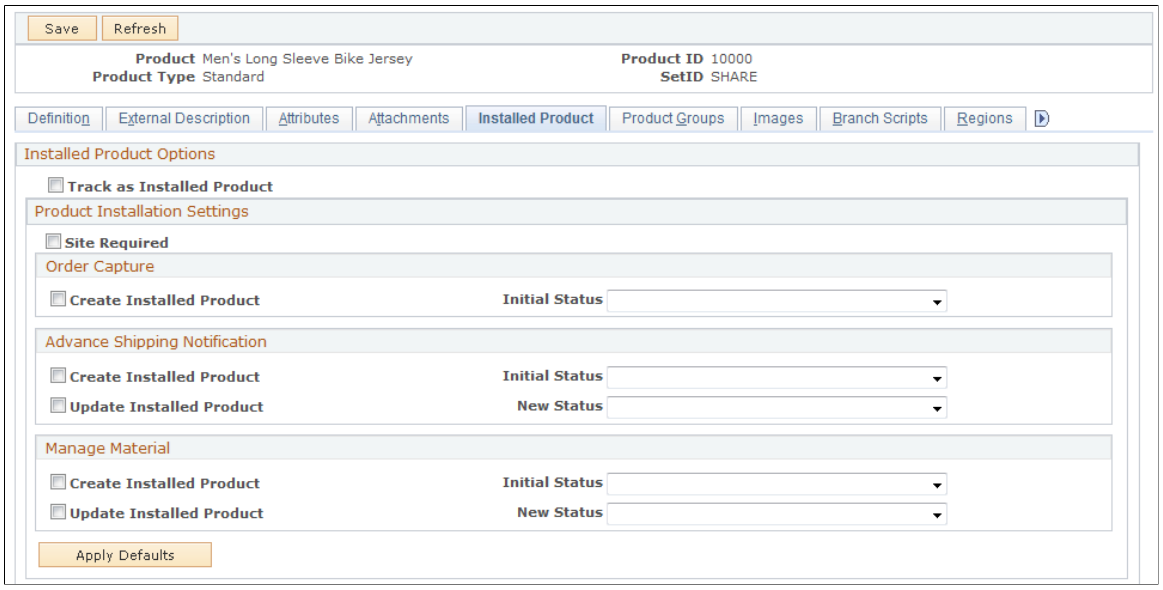
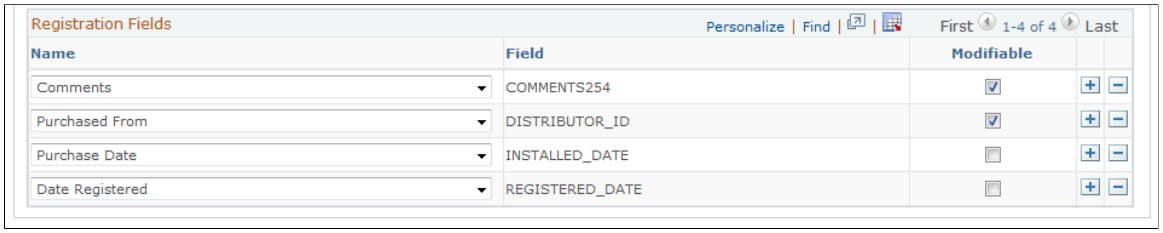
Navigation:

Products CRM > Product Definition > Installed Product

This example illustrates the fields and controls on the Product Definition - Installed Product page (1 of 2).



This example illustrates the fields and controls on the Product Definition - Installed Product page (2 of 2).



Field or Control	*Description*
Track as Installed Product	Select to enable installed products to be created automatically for the product.

Product Installation Settings

Field or Control	*Description*
Service Order Required	Select if a service order must be created for product installation.

Field or Control	*Description*
Install Service ID	Select the ID of the service that would be used to install the product. Define services using the Services component under **Set Up CRM** > **Product Related** > **FieldService.** **Note:** If a site is required for the service you selected, the system automatically selects the **Site Required** check box. Also, if the same service is used to remove the product, the system automatically fills in the **Uninstall Service ID** field with the name of the service.
Site Required	Select to require a customer site on orders that are created for the product in PeopleSoft Order Capture or Order Capture Self Service. If selected, users must select a site address for the install address on the Entry Form - Shipping page before they can save the order.
Uninstall Service ID	Select the ID of the service that would be used to remove the product. Define services using the Services component under **Set Up CRM** > **Product Related** > **FieldService.**
Un-Install Service Order	Select if a service order is required to remove the product.
Apply Defaults	Click to populate the appropriate default rules that determine how system transactions create and update installed products. The system returns one of two default rule sets depending on whether the **Service Order Required** check box is selected. You can modify these rules as necessary for the specific product. Default creation and update rules for installed products are defined on the Installed Product Defaults page under **Set Up CRM** > **Install** > **Product Options.**

Note: The fields in the **Order Capture, Shipping Notification (ASN),** and **Manage Material** group boxes are the same as those on the Installed Product Defaults page.

See Defining Creation and Update Rules for Installed Products.

Registration Fields

Use the **Registration Fields** group box to define which of the installed product fields appear for users on the Product Registration - Product Registration Details page, where they register products.

The system populates this area with the default values that you define on the Product Registration Setup page. You can modify this registration field list as needed. The selection that you make on the Product Definition - Installed Product page is specific to the associated product only.

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See “Product Registration Setup Page” (Application Fundamentals).

Related Links

“Order - Entry Form Page or Quote - Entry Form Page” (PeopleSoft Order Capture Applications)

Configuring Installed Product Display Options

To configure installed products, use the Installed Product Configuration (RF_IPRD_CONFIG) and Installed Product Statuses (RF_IPRD_CFG_STAT) components.

Pages Used to Configure Installed Product Display Options

Page Name	*Definition Name*	*Usage*
Installed Product Status Options Page	RF_IPRD_CFG_STAT	Enter installed product status options.
Configuration Options Page	RF_IPRD_CONFIG	Specify, by setID, display templates to be used for installed product types.
Define Status Translates Page	RF_IPRD_CONFIG_ST	Define status translate values for installed products.

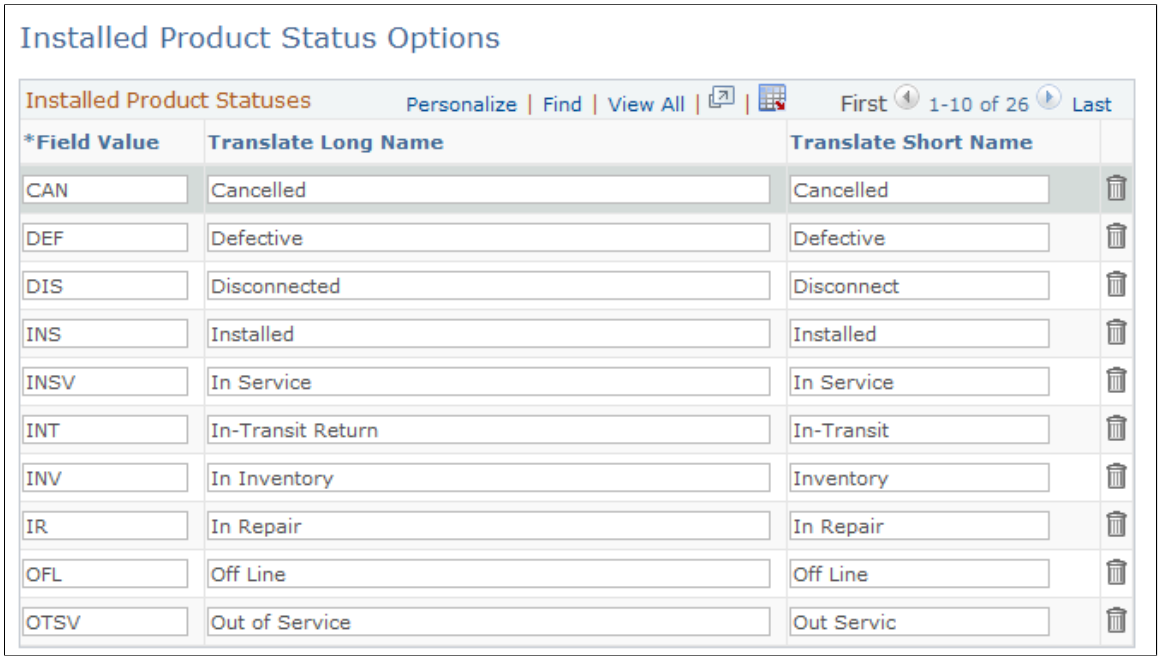
Installed Product Status Options Page

Use the Installed Product Status Options page (RF_IPRD_CFG_STAT) to enter installed product status options.

Navigation:

Set Up CRM > **Common Definitions** > **Installed Product** > **Installed Product Statuses** > **Installed Product Status Options**

This example illustrates the fields and controls on the Installed Product Status Options page.



Enter the code, long description, and short description for the statuses that you want to use for the installed products that you use in your business environment. Users and implementers can select these values from many pages within CRM, including the Define Status Translates page that is documented in this section.

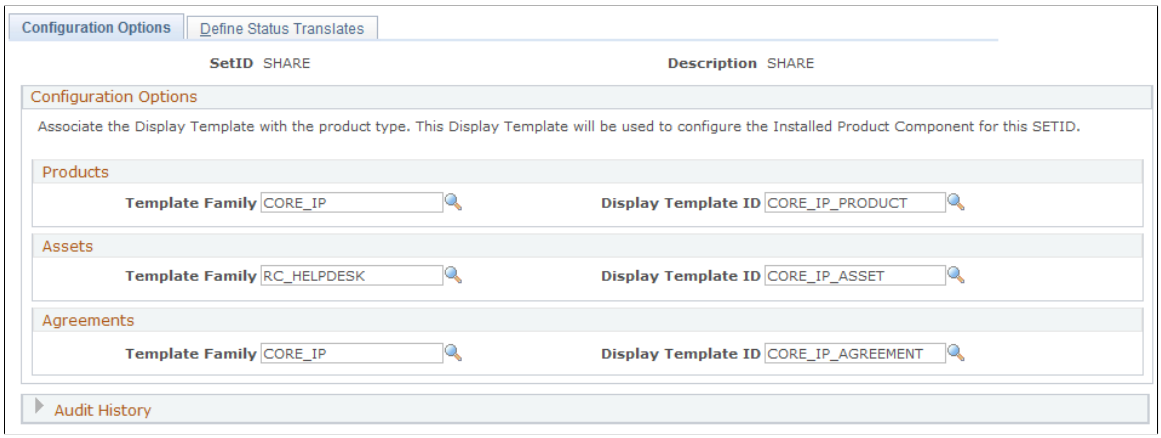
Configuration Options Page

Use the Configuration Options page (RF_IPRD_CONFIG) to specify, by setID, display templates to be used for installed product types.

Navigation:

Set Up CRM > **Common Definitions** > **Installed Product** > **Configuration Options** > **Configuration Options**

This example illustrates the fields and controls on the Configuration Options page.



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For each setID that uses installed products, you must associate each of the installed product types being used with a display template to determine how their records should be presented. A system message appears if an installed product record is opened but then its type is not associated with a display template.

Specify a display template family before selecting a display template for each installed product type.

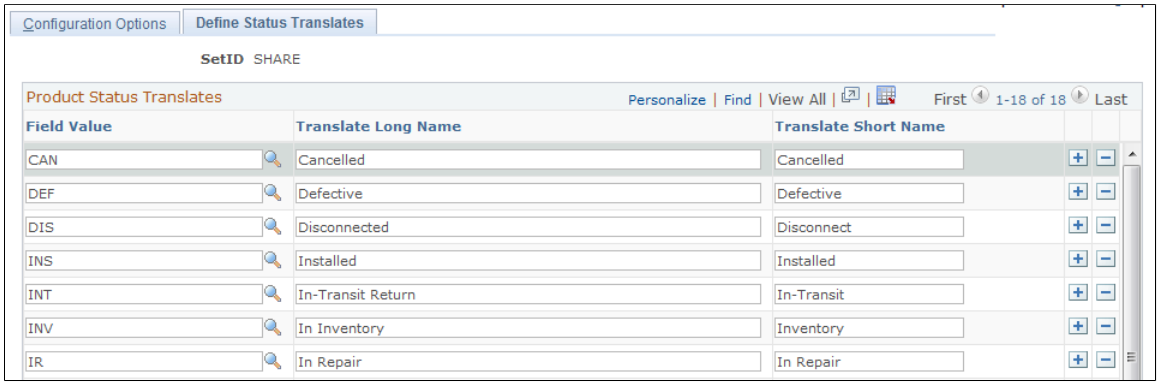
Define Status Translates Page

Use the Define Status Translates page (RF_IPRD_CONFIG_ST) to define status translate values for installed products.

Navigation:

Set Up CRM > **Common Definitions** > **Installed Product** > **Configuration Options** > **Define Status Translates**

This example illustrates the fields and controls on the Define Status Translates page (1 of 2).



This example illustrates the fields and controls on the Define Status Translates page (2 of 2).

Note: Status code values are defined on the Installed Product Status Options page, under **Set Up CRM** > **Common Definitions** > **Installed Product** > **Installed Product Statuses** > **Installed Product Status Options.**

Use this page to define translate values for installed products and installed assets. Enter the field value for each type of product that you are using and then enter a long and short translate name.

Based upon the type of product you are installing, the system displays the values that you enter in the **Translate Long Name** field in the drop-down list box for the **Status** field on the Installed Product page.

Note: If you do not have PeopleSoft HelpDesk installed, the system does not display the **Asset Status Translates** group box.

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Warning! If you are defining a new set of status translates, the following values should always be used in addition to any optional statuses that you want to add: *INS* (Installed), *UNI* (Uninstalled), *SHP* (Shipped), and *PND* (Pending). These statuses are hard-coded throughout the system for certain scenarios.

Setting Up Trees for Installed Products

To set up trees for installed products, use the Installed Product Tree Setup (RF_IPRD_TREE_DEFN) component.

Pages Used to Set Up Trees for Installed Products

Page Name	***Definition Name***	***Usage***
General Options Page	RF_IPRD_TREE_DEFN	Define the tree configuration (images to display in the tree, image size, page size, and date filter).
Define Nodes Page	RF_IPRD_TREE_NODE	Define the parent and child relationship of the tree nodes.
Test Tree Page	RF_IPRD_TREE_TEST	Test the 360-Degree View tree to ensure that you configured it correctly.

General Options Page

Use the General Options page (RF_IPRD_TREE_DEFN) to define the tree configuration (images to display in the tree, image size, page size, and date filter).

Navigation:

Set Up CRM > **Common Definitions** > **Installed Product** > **Installed Product Setup Tree** > **General Options**

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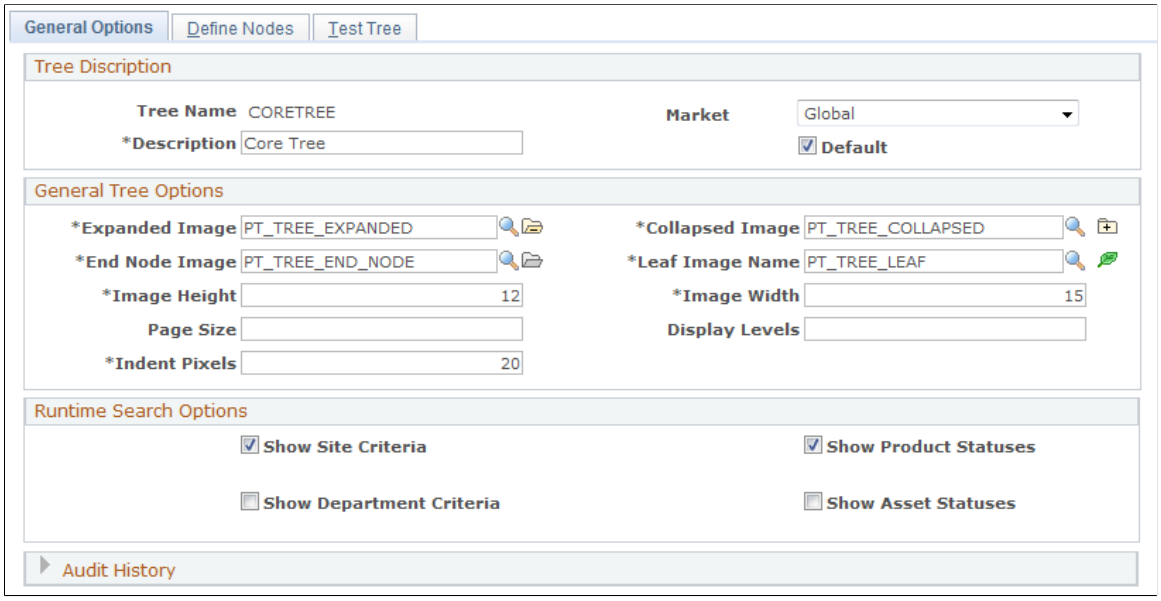
This example illustrates the fields and controls on the General Options page.



Field or Control	*Description*
Tree Name	Displays the name for the tree for the installed product that you entered on the Add page.
Description	Enter a description of the tree you are adding.
Market	Select the market that will use the tree.
Default	Select to set this tree as the default tree that appears for this market on the Installed Product Hierarchy page if multiple trees exist.

General Tree Options

Use the fields in this group box to configure how the tree will look on the Installed Product Hierarchy page.

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Field or Control	*Description*
Expanded Image, Collapsed Image, End Node Image, and Leaf Image Name	Enter the images that you want the system to display on the tree. A representation of the image appears to the right of the field. The defaults are: • **Expanded Image:** *PT_TREE_EXPANDED* • **Collapsed Image:** *PT_TREE_COLLAPSED* • **End Node Image:** *PT_TREE_END_NODE* • **Leaf Image Name:** *PT_TREE_LEAF*
Image Height and **Image Width**	Enter the size of the image that you want to appear on the tree. The default size is 12 by 15.
Page Size	Enter the page size for the tree. This is the size of the HTML area where the tree is displayed on the Installed Product Hierarchy page. To show the entire tree, enter zero (0).
Display Levels	Enter the maximum number of levels to display on the tree at any given time. To show all levels, enter zero (0).
Indent Pixels	Enter the number of pixels to indent each node. The recommended value is 20.

Runtime Search Options

When a user accesses the Installed Product Hierarchy page, the system displays the **Product Name** and **Installed Product ID** fields. To add additional search options to the page, select one or more of the check boxes that appear in this group box.

If you do not select any of the status check boxes, then the system hides the **All** and **Single Status** options and status drop-down list boxes. If you select one or more status check boxes, the system combines the statuses when it prompts the user for a value.

Note: The system does not display the **Show Department Criteria** and **Show Asset Statuses** check boxes unless you have PeopleSoft HelpDesk installed.

Define Nodes Page

Use the Define Nodes page (RF_IPRD_TREE_NODE) to define the parent and child relationship of the tree nodes.

Navigation:

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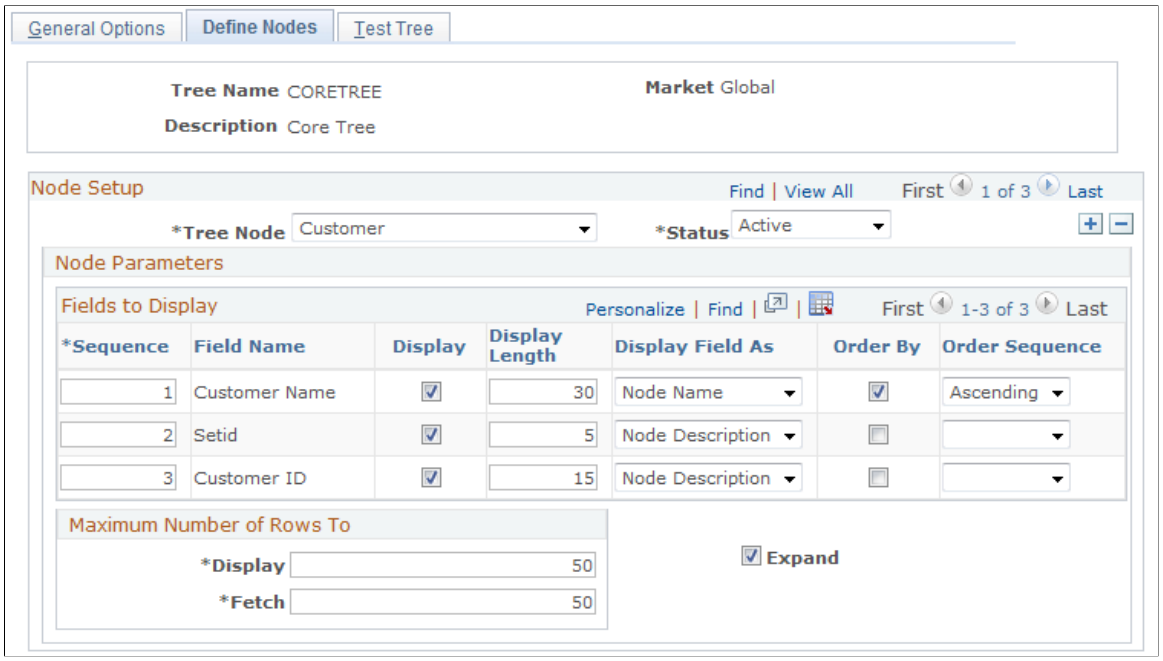
Set Up CRM > Common Definitions > Installed Product > Installed Product Setup Tree > Define Nodes

This example illustrates the fields and controls on the Define Nodes page.



This page enables you to establish nodes for customer, site, contact, department, employee, and installed product and children.

Node Setup

Field or Control	*Description*
Tree Node	Select the type of node that you want to add to the tree. The system displays a list of fields associated with the node type in the **Node Parameters - Fields to Display** group box. • *Customer:* The system displays the **Customer Name** (default), **Customer ID,** and **SetID** fields. • *Department:* The system displays the **Description** (default), **Department ID,** and **SetID** fields. • *Employee:* The system displays the **Employee Name** (default) and **Employee ID** fields. • *Site:* The system displays the **Site Name** (default), **Site ID,** and **Address** fields. • *Installed Product and Children:* The system displays the **Installed Product ID** (default), **Product Description** (default), **Status, Serial ID,** and **Asset Tag** fields. This node is a required node. When adding a new tree definition, the system automatically adds this node. **Note:** If a single installed product has multiple statuses, then the system displays *Multiple* on the tree. **Note:** If PeopleSoft HelpDesk is not installed, then the system does not display the *Department* and *Employee* nodes in the **Tree Node** drop-down list. Also, if you establish nodes for *Customer* or *Site,* then the system does not permit you to establish nodes for either the *Department* or *Employee* nodes and vice versa.
Status	Select the tree node status; either *Active* or *Inactive.* For the node to appear on the tree, the status must be *Active.*

Node Parameters - Fields to Display

Use the fields in this group box to indicate how you want the fields to display for the node you selected.

Field or Control	*Description*
Sequence	Enter a number to indicate the order in which you want the fields to appear on the tree.

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Field or Control	*Description*
Display	Select this check box for all the fields that you want the system to display for the node.
Display Length	The system displays the number of characters that it can display for the field. The system can connect in a series one or more fields on any of the **Display Field As** options. Each option, however, has a maximum concatenated display length. For *Node Name,* the maximum is 30 characters. For *Node Description,* the maximum is 40 characters. For *Mouseover Text,* the maximum is 100 characters.
Display Field As	Select an option to indicate how you want the system to display the field name. You can choose either *Node Name, Node Description,* or *Mouseover Text.* If you select *Mouseover Text,* the system displays the name of the field when a user moves their mouse over the node image whether it is a collapsed, expanded, or leaf image. **Note:** Nodes always display text as < Node Name> – <Node Description>. Thus, all **Node Name** fields should be sequenced before entering node descriptions. The system forces you to enter it in this sequence if you make a mistake.
Order By and **Order Sequence**	Select this check box if you want the system to order the nodes in the tree in either ascending or descending order. If you select the **Order By** check box for a field, then you must select either *Ascending* or *Descending* from the **Order Sequence** drop-down list box. The sequence number determines the order in which the system orders the fields if you select the **Order By** check box for multiple fields.

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Maximum Number of Rows To

Field or Control	*Description*
Display and **Fetch**	Enter the maximum number of rows to display under the expanded node in the Installed Product Hierarchy. Then enter the maximum number of rows to fetch, or retrieve, from the database when the user clicks View All on the tree node. **Note:** If you leave this field blank, the system retrieves 1000 rows. For the Installed Product and Children node, this value applies to the number of installed product records matching the search criteria, not the total installed product records in the entire family.
Expand	Select this check box if you want the system to automatically expand the node when a user accesses the tree. For all nodes other than the Installed Product and Children node, the system loads all parents and children despite the setting of this flag. The system either collapses or expands each node as necessary based on the setting of this flag before display. For the Installed product and child nodes, however, the system loads the children upon demand if you do not select this check box for the node.

Test Tree Page

Use the Test Tree page (RF_IPRD_TREE_TEST) to test the 360-Degree View tree to ensure that you configured it correctly.

Navigation:

Set Up CRM > **Common Definitions** > **Installed Product** > **Installed Product Setup Tree** > **Test Tree**

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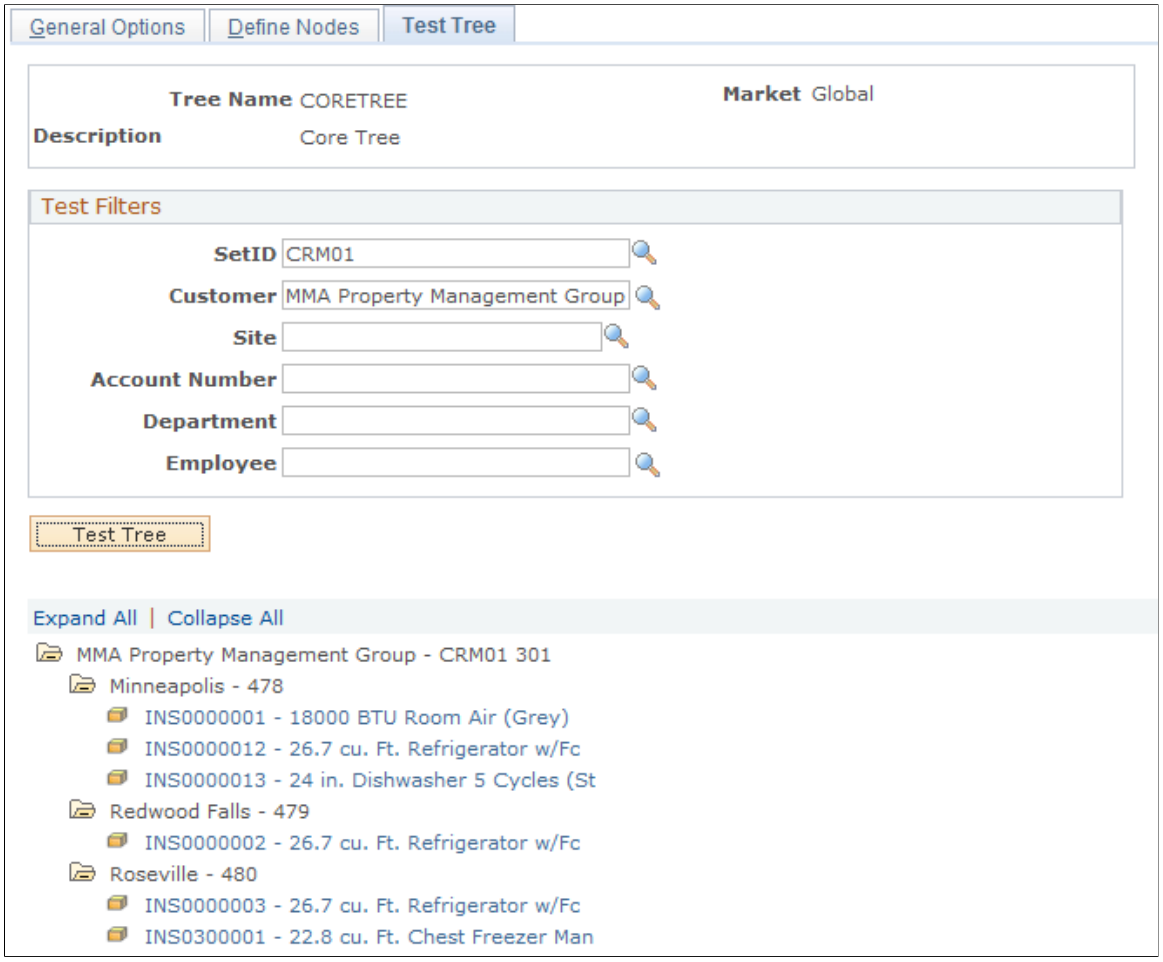
This example illustrates the fields and controls on the Test Tree page.



1. Enter data into at least two of the fields in the **Test Filters** group box (at a minimum, one field must be **SetID**).

2. Click the **Test Tree** button.

The system verifies the tree configuration and displays that particular tree based on the criteria you entered. This is how the tree will appear on the Installed Product Hierarchy page.

Copying Trees

This section discusses how to copy a tree.

Page Used to Copy a Tree

Page Name	*Definition Name*	*Usage*
Copy Tree As Page	RF_IPRD_TREE_COPY	Copy an existing installed product tree setup to a new one.

Copy Tree As Page

Use the Copy Tree As page (RF_IPRD_TREE_COPY) to copy an existing installed product tree setup to a new one.

Navigation:

Set Up CRM > **Common Definitions** > **Installed Product** > **Clone Installed Product Tree** > **Copy Tree As**

This example illustrates the fields and controls on the Copy Tree As page.

To copy an existing tree, select a tree from the Copy Tree search page and then enter the name of the new tree in the **New Tree Name** field. Click **Save.**

Note: If the *Copy From* tree was the default tree for the market, then the system will not select the default flag for the new tree.

Configuring Roles

To configure roles for installed products, use the Installed Product Tree Roles (RF_IPRD_TREE_ROLE) component.

This section discusses how to configure roles for installed products.

Page Used to Configure Roles

Page Name	*Definition Name*	*Usage*
Configure Role Page	RF_IPRD_TREE_ROLE	Assign and prioritize installed product tree setups to a role.

Configure Role Page

Use the Configure Role page (RF_IPRD_TREE_ROLE) to assign and prioritize installed product tree setups to a role.

Navigation:

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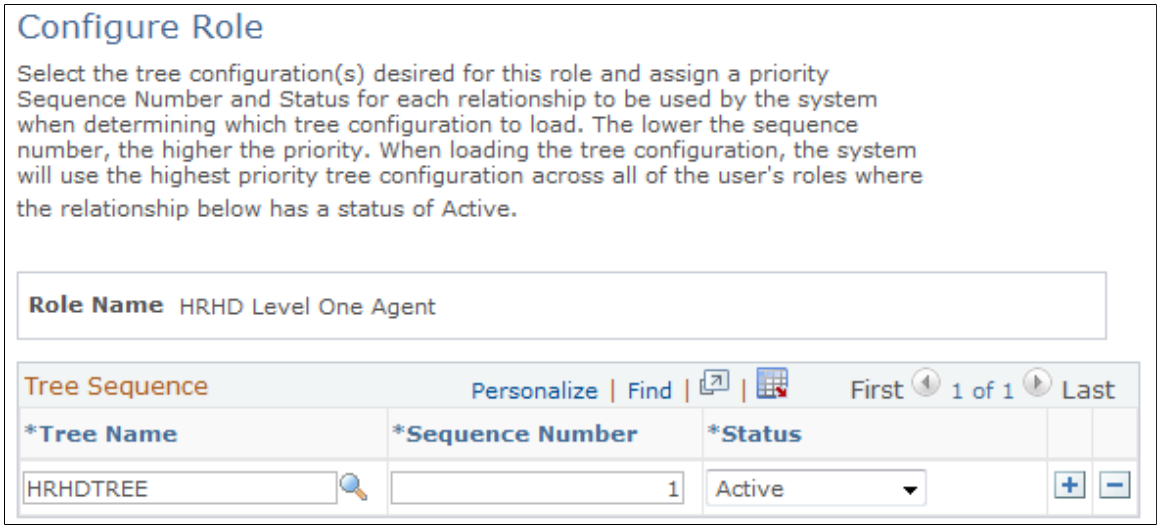
Set Up CRM > Common Definitions > Installed Product > Configure Roles > Configure Role

This example illustrates the fields and controls on the Configure Role page.



Use this page to associate a given role with a tree configuration. The system uses this information to determine which tree configuration to display when a user accesses the Installed Product Hierarchy page.

Enter a sequence number for the tree so the system knows what tree to display when the user has multiple roles. You can also use the **Status** field to activate and inactivate trees as needed.

These are the steps that the system follows when selecting a tree configuration to load:

1. Select the tree associated with the user's role as specified on the Configure Role page.

   If the user has multiple roles defined, the system selects the tree having the lowest sequence number across all user roles that is also active. If multiple roles have the same sequence number, or if none are found, the system skips ahead to Step 2.

2. Select the tree associated with the user's market that has the default flag selected.

   If market is not assigned to the user's preferences or if no default tree is associated with the user's market, the system skips ahead to Step 3.

3. Select the tree associated with the global market that has the default flag selected.

   If none exists, the system skips ahead to Step 4.

4. If no default tree exists for the global market, then the system creates a skeleton tree consisting of only the installed product and children nodes.

Setting Up Product Registration

Use the Product Registration page to specify the statuses for installed products and services by setID. You can also use this page to define the installed product fields that appear on the Product Registration Details page and to indicate which fields are modifiable or read-only.

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Related Links

"Setting Up Product Registration" (Application Fundamentals)

Managing Installed Products

To manage installed products, use the Installed Product (RF_INST_PRODUCT) and Order Capture (RO_CAPTURE) components.

Note: In this section, the discussion of the Installed Product component is based on how it appears through system-delivered display templates. The visibility of sections and fields may differ if a modified or different display template is used.

Pages Used to Manage Installed Products

Page Name	*Definition Name*	*Usage*
Installed Product - Installed Product Page or Installed Assets - Installed Product Page	RF_INST_PRODUCT	Create or update installed products of any given type to track products that are installed at customer sites or issued to internal workers.
Installed Product Address Page	RF_IPRD_ADDR	Add or update addresses for installed products.
Installed Product - Preventive Maintenance Detail Page	RF_INST_PROD_PM	View or update pending preventive maintenance entries, or review the history of preventive maintenance entries for selected installed products. Preventive maintenance details are only available to installed products that are serial number-controlled or asset tag-controlled.
Installed Product - Attributes Page or Installed Assets - Attributes Page	RB_ATTR_RUN_IPROD	Capture installed product data that is specific to business or industry requirements.
Installed Product - History Page or Installed Assets - History Page	RF_INST_PROD_HIST	View information about events, audits, cases, and service orders that is associated with the installed product.

Related Links

"Understanding Future Dated Orders" (PeopleSoft Order Capture Applications)

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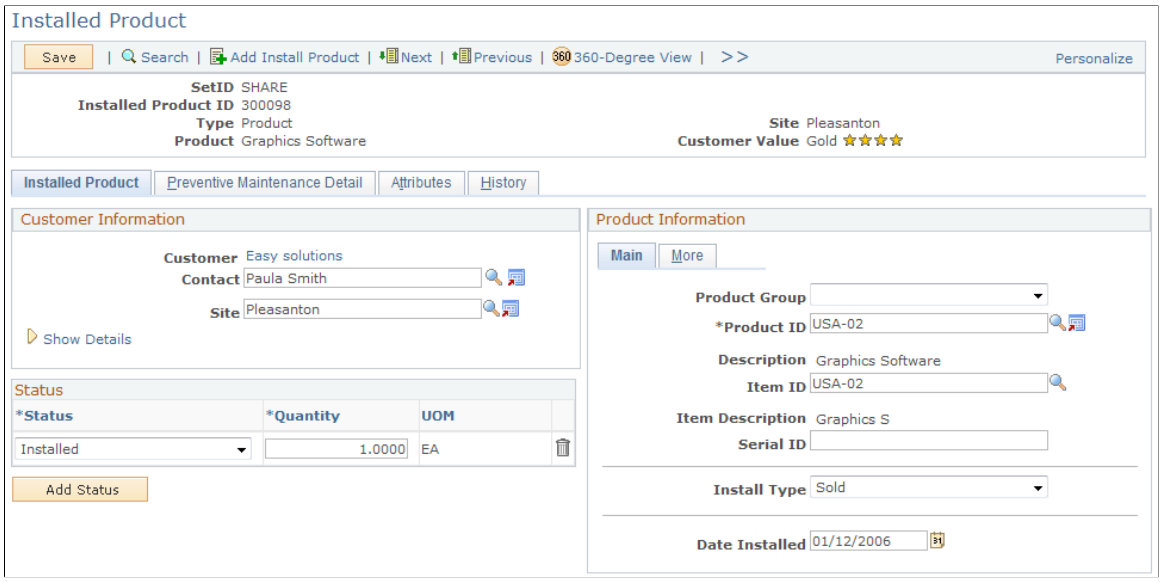
Installed Product - Installed Product Page or Installed Assets - Installed Product Page

Use the Installed Product - Installed Product page or Installed Assets - Installed Product page (RF_INST_PRODUCT) to create or update installed products of any given type to track products that are installed at customer sites or issued to internal workers.

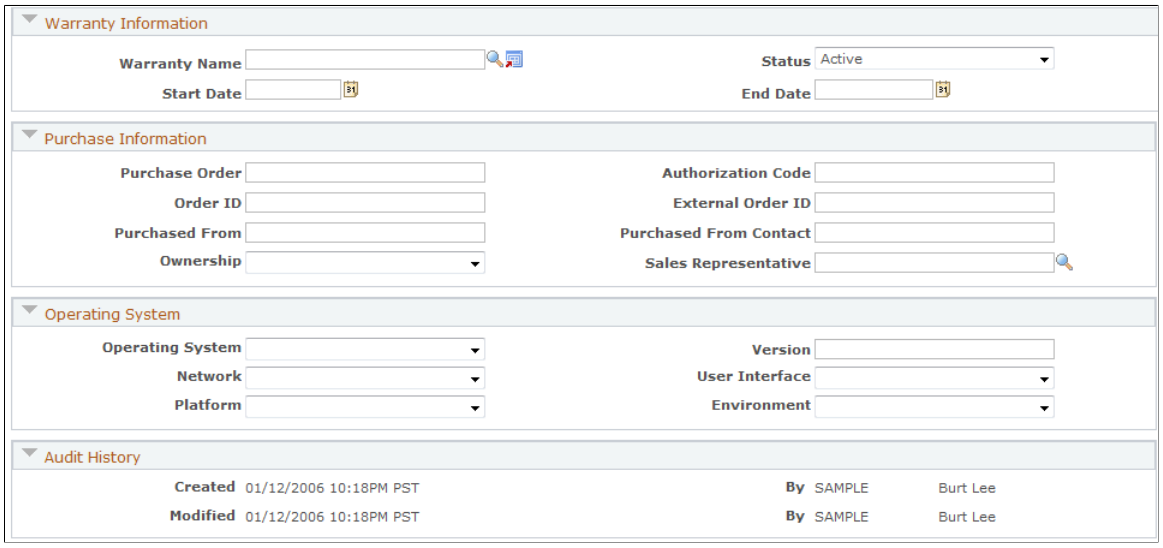
Navigation:

- **Installed Products** > **Installed Product**
- **HelpDesk** > **Installed Assets** > **Installed Product**

This example illustrates the fields and controls on the Installed Product - Installed Product page (1 of 2).



This example illustrates the fields and controls on the Installed Product - Installed Product page (2 of 2).



Note: Installed products can also be added from 360-Degree View.

Customer Information

Use the fields in this section to record information about the customer.

Note: This section is labeled **Owner Information** for installed assets.

Field or Control	*Description*
Customer	Enter the customer who owns or leases the installed product. After a customer is selected successfully, its name appears as a link. Click the **Customer** link to transfer to the corresponding company or consumer record. A customer can be a company or a consumer, which is created manually using the Company component (Customers CRM, Add Company).
First Name, Last Name, and **Contact**	Enter the first and last name of a company contact to whom the installed product is given. The system limits the selection of contacts to those that are associated with the selected customer. After a contact is selected successfully, the **Contact** field appears and replaces the **First Name** and **Last Name** fields. Click the **Transfer to Contact** button to transfer to the corresponding person record. You can add business contacts using the Person component (Customers CRM, Add Person).
Postal	Enter a postal code to refine the customer and contact search.
Site	Enter a site of the customer where the installed product is located. Click the **Transfer to Site** button to transfer to the corresponding site record. You can add sites for customers using the Company, Consumer, or Site component (Customers CRM, Add Site).
Phone	Displays the phone number of the selected contact.
Location Details	Enter notes about the specific area within the customer's site where the installed product is located.

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Owner Information

This section replaces the **Customer Information** section if the currently opened installed product is of type *asset*.

Field or Control	*Description*
Asset Owner	Select the owner of the asset, which can be: *Employee:* This is the default value. When selected, an employee must be specified. *Department:* When selected, an asset department must be specified. *Location:* When selected, an asset location must be specified. *None:* When selected, the only value you can optionally specify is asset contact. An AAF term called *Installed Asset Owner* is created for this field. **Note:** Because the CRM and Financials systems interpret *asset owner* differently, the **Asset Owner** field in these two systems are not mapped and the data is not published from the CRM to the Financials system.
Employee	Enter a worker for the installed asset. On the Installed Asset page, the system displays workers (employees) who are defined in the CRM system. Set up workers under **Workforce** > **Worker**. If an employee is specified but the selected asset owner is not *Employee*, a system message appears when the installed asset is saved. To correct the error, either reselect the asset owner based on the value that is being specified (employee in this case), or remove the employee value and specify another value that is required by the selected asset owner.

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Field or Control	*Description*
Asset Department	Enter the department that owns the asset. Choose from a list of active departments that are based on the setID of the installed asset. The system does not automatically default the employee's department as the value of the asset department in add mode. If an asset department is specified but the selected asset owner is not *Department*, a system message appears when the installed asset is saved. To correct the error, either reselect the asset owner based on the value that is being specified (asset department in this case), or remove the asset department value and specify another value that is required by the selected asset owner.
Asset Location	Enter the location where the asset resides. Choose from a list of active locations that are based on the setID of the installed asset. The system does not automatically default the employee's location as the value of the asset department in add mode. If an asset location is specified but the selected asset owner is not *Location*, a system message appears when the installed asset is saved. To correct the error, either reselect the asset owner based on the value that is being specified (asset location in this case), or remove the asset location value and specify another value that is required by the selected asset owner.
Asset Contact	Enter the employee to which the asset is assigned. Choose from a list of active employees that are based on the setID of the installed asset. The system does not automatically default the employee of the installed asset as the value of the asset contact in add mode. If an asset contact is specified but the selected asset owner is not *None*, a system message appears when the installed asset is saved. To correct the error, either select *None* as the new asset owner, or specify another value that is required by the selected asset owner. An AAF term called *BO ID of Asset Contact* is created for this field.
Department and **Location**	Displays the department and location of the employee selected for the installed asset.

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Status

Field or Control	*Description*
Status	Select the current status of the installed product. Available values are configured on the Define Status Translates page which is keyed by setID and are different by installed product type. The status of an installed product can be set manually (if the installed product is created manually) or automatically (if the installed product is generated by the system as a result of a business process). **Note:** The system uses the Active Analytics Framework (AAF) to cascade the status and reason code of the parent installed product to its child installed products if the installed product status was not empty and the installed product status has changed. The parent status is cascaded only to those children whose status is equal to the original parent status. This policy is called *Installed Product Cascade Status* and is delivered for the *COM01* setID as an active policy. See Define Status Translates Page.
Quantity	Enter the quantity (in the standard unit of measure) of the installed product in the indicated status. If the item is serial-controlled, the quantity is set to *1* by default. You must enter a nonzero value for each row of status before saving the installed product. Multiple rows appear for partial shipments of an installed product order to indicate the status for each quantity. You can add rows manually as necessary to indicate the quantity of an installed product in repair, uninstalled, and so forth.
UOM (unit of measure)	Indicates the unit of measure being used for the quantity. For example, package, each, pallets, and so on.

See “Modifying Industry-Specific Translate Values” (Automation and Configuration Tools).

Product Information

Use the fields in this group box to enter product information.

For installed assets, this section is labeled **Asset Information.**

Note: Depending on the installed product type, some of the fields in this section are hidden because they do not apply. For example, the **Asset Tag** field is not visible in installed products because the field is specific only to installed assets.

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Field or Control	*Description*
Product Group	(Optional) Select a product group to refine the list of products available for selection. This field lists all the product groups of all types that are associated with the setID of the installed product. If you select a product for the installed product and that product happens to belong to only one product group, the system automatically populates that product group value in this field. Product groups are effective dated in installed product records. It means that if you open an installed product created some time ago and the product group that it references is no longer active, the value is not displayed. However, if you search for installed products by product group on the search page, product groups are not effective dated. **Note:** If multiple product groups have the same name and description but different types, then only one instance of this product group appears as an available value (the description appears). And if you select this product group, the system makes all products that are associated with all product groups using this name available for selection. Similarly, suppose that multiple product groups have the same name (for example, dishwasher) but different descriptions (for example, DW-Acct and DW-Gen) and types (for example, Acct and General). In this example, if you select one of the two product groups, which have different descriptions but share the same product group code, PeopleTools picks the first available entry in the product group base table (PROD_GROUP_TBL) and displays the value, and in this case it is DW-Acct. Therefore, if you select the DW-Gen product group, the system overrides your selection to DW-Acct because DW-Acct comes before DW-Gen alphabetically in the product group base table. An AAF term called *Product Group* is created for this field.
View Configuration	Click to access the Installed Product Hierarchy Page o view the configuration of the associated product. This link is available only to installed products for product packages.
Item ID	Enter the ID of the item that is installed at the customer site. Establish items using the Item Primary EIP or the Item Definition component.
Serial ID	Enter the serial number if the item is serial-controlled.

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Field or Control	*Description*
Install Type	Select the reason why the product was installed at the customer site (for informational purposes only). Values are *Beta, Demo, Evaluation, Loan,* and *Sold.*
Date Installed	Enter date of installation if you are creating or updating installed products or installed assets manually. The system populates this field, as applicable for the given transaction, when it creates or updates installed products or installed assets.

Access the More tab.

Field or Control	*Description*
Parent Product	Enter another installed product to define as the parent of this installed product. View parent, child, and sibling relationships between installed products on the Installed Product Hierarchy page. **Note:** When Asset Management integration is enabled, select an installed product of type *IT Hardware* as the parent product. However, only those products that are synchronized between CRM and Financials application are available for selection.
Manufacturer	Select the manufacturer of the product. You set up manufacturers on the Manufacturers page (**Set Up CRM** > **Common Definitions** > **Manufacturers**).
Price Per Unit	Displays the price of the product per unit if such value is available.
Date Ordered, Date Shipped, and **Date Registered**	Enter dates if you are creating or updating installed products or installed assets manually. The system populates these fields, as applicable for the given transaction, when it creates or updates installed products or installed assets. The **Date Registered** field does not apply to installed assets.

Asset Information

The **Product Information** section is renamed **Asset Information** for installed assets. In addition to the fields described in the **Product Information** section, this section also contains fields that pertain to installed assets.

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Field or Control	*Description*
Asset Tag	Enter the asset tag that is available if the item is issued an internal worker.

These fields appear if the **Enable Asset Integration with PeopleSoft Financials** option is enabled in the general option of the display template.

Note: These fields (**Validated**, **Asset Type**, **Asset Subtype** and **Transfer**) must be enabled in the display template in order for them to be shown when the asset integration option is enabled.

Field or Control	*Description*
Validated	Indicates whether or not the data in the installed asset has been validated. Values are *Yes* and *No*.
Asset Type	Specify a type for the installed asset.
Asset Subtype	Specify a subtype for the installed asset. Available values are filtered by the selected asset type.

Registration

Field or Control	*Description*
Date Registered	Enter the date when the product is registered and the installed product is created or updated. If this installed product is registered using the Product Registration component, this field displays the date when the registration is submitted.

Warranty Information

Only one warranty can be associated with an installed product.

Field or Control	*Description*
Warranty Name	Enter the warranty that is associated with the item. Click the **Transfer to Warranty** button to access the component you use to define warranties.

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Field or Control	*Description*
Status	Select the current status of the warranty for the installed product, either *Active* or *Inactive.* For entitlement searches from cases or service orders that reference an installed product, the system first checks for an active warranty that is valid for the current date.
Start Date and **End Date**	Enter the dates when the warranty period begins and ends for the installed product. The system populates start date automatically using the install, ship, or order date for the installed product, depending on the start date option that the warranty definition specifies. The default end date is based on the length that the associated warranty definition specifies.

Purchase Information

Field or Control	*Description*
Purchase Order	Enter the customer's purchase order number for the installed product.
Authorization Code	Enter the authorization code that the credit card company provides, if applicable.
Order ID	Enter the order identification number for the installed product.
External Order ID	Enter the customer's order identification number for the installed product, if it exists.
Purchased From	Enter the name of the customer the installed product is purchased from.
Purchased From Contact	Enter the name of the contact the installed product is purchased from.
Ownership	Select whether the customer owns the installed product or possesses it under the terms of a lease or rental agreement.

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Field or Control	*Description*
Sales Representative	Enter the name of the sales representative who is associated with the order for the installed product. If your installation includes PeopleSoft Sales, the system prompt for this field lists the people who are defined as sales force representatives in the system.

Operating System

The fields in this group box are relevant to installed computers, computer software, and computer accessories, and are for information purposes only. Enter or select the information from the fields that appear in this group box.

Related Links

"Service Order Toolbar Functions" (PeopleSoft Integrated FieldService)

Installed Product - Preventive Maintenance Detail Page

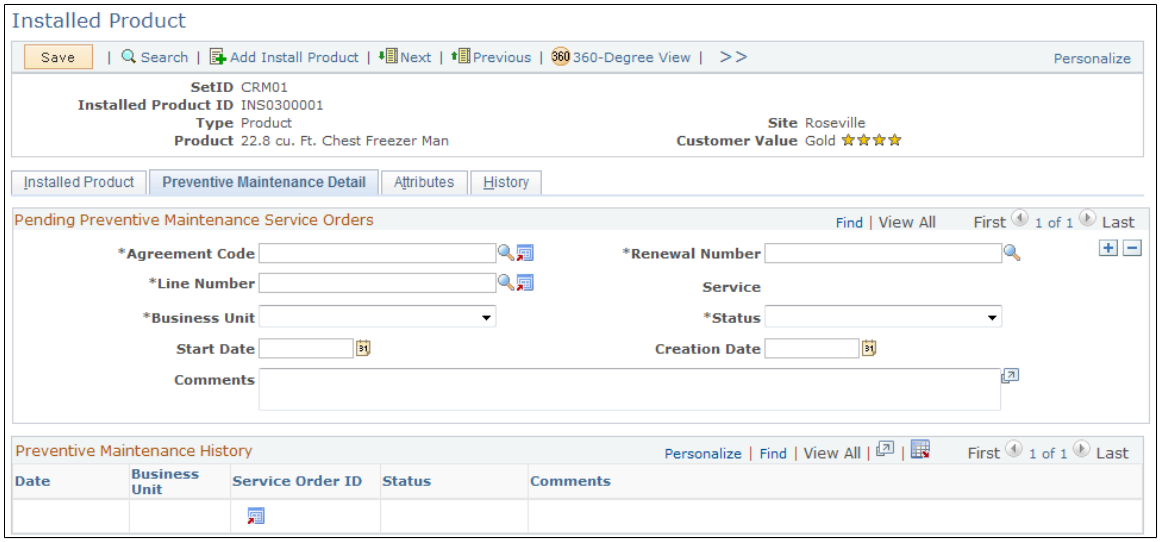
Use the Installed Product - Preventive Maintenance Detail page (RF_INST_PROD_PM) to view or update pending preventive maintenance entries, or review the history of preventive maintenance entries for selected installed products.

Navigation:

Installed Products > **Installed Product** > **Preventive Maintenance Detail**

Note: If you are adding a service or asset, the system does not display this page. Preventive maintenance details are only available to installed products that are serial number-controlled or asset tag-controlled.

This example illustrates the fields and controls on the Installed Product - Preventive Maintenance Detail page.



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Use this page to view the preventive maintenance history of the installed product. You can also preview and update information about the upcoming preventive maintenance service using the agreement code, renewal number, line number, business unit, status start date, and creation date.

See “Managing Scheduled Preventive Maintenance” (PeopleSoft Integrated FieldService).

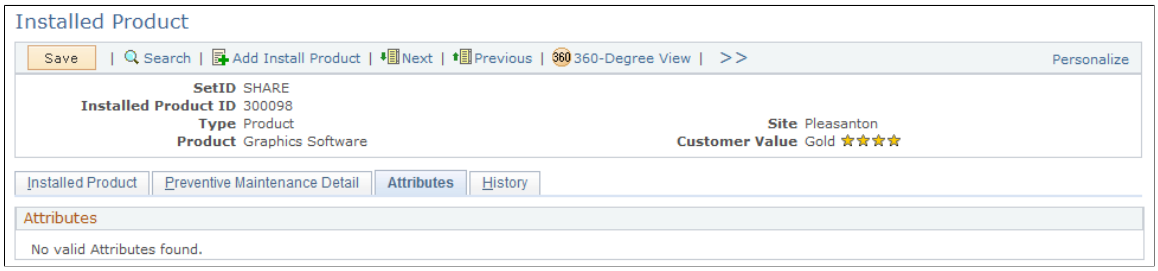
Installed Product - Attributes Page or Installed Assets - Attributes Page

Use the Installed Product - Attributes page (RB_ATTR_RUN_IPROD) to capture installed product data that is specific to business or industry requirements.

Navigation:

- **Installed Product** > **Attributes**
- **Installed Assets** > **Attributes**

This example illustrates the fields and controls on the Installed Product - Attributes page.



Attribute groups and attributes that are associated with the Installed Product component appear on this page if their conditions are evaluated to true.

Depending on the setup, an attribute field can be an edit field or a drop-down list box, which can be set as display-only or available for edit.

An attribute field can be set as hidden from this page on the Object Type Attributes page for the *Installed Product* object type.

Refer to the “Understanding Attributes” (Automation and Configuration Tools)topic for more information on using and setting up attributes in PeopleSoft CRM.

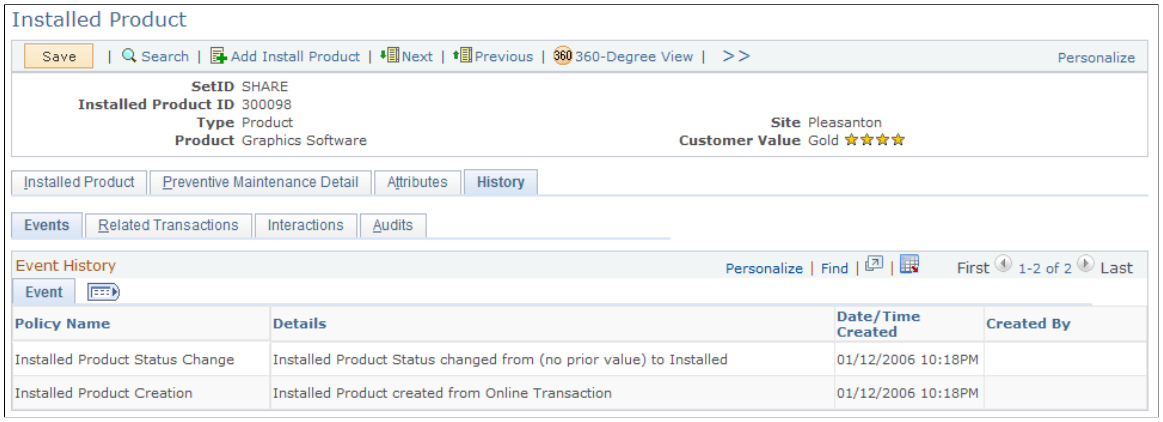
Installed Product - History Page or Installed Assets - History Page

Use the Installed Product - History page or Installed Assets - History page(RF_INST_PROD_HIST) to view information about events, audits, cases, and service orders that is associated with the installed product.

Navigation:

- **Installed Products** > **History**
- **Installed Assets** > **History**

This example illustrates the fields and controls on the Installed Product - History: Events page.



History - Events

Click the Events tab to view events that are associated with the installed product.

The CRM system generates logs for these installed product events (if functionality is enabled) based on the setID in which they occur:

Policy Name	***Description***
Installed Product Parent Change	Changes in the parent-installed product ID, showing old and new values.
• Installed Product Creation • CSS:Installed Product Creation	Creation of installed products, showing where they were created from.
• Installed Product Status Change • CSS:Installed Product Status Change	Changes in status, showing the old and new values.
• Installed Asset Employee Transfer • Installed Asset Department Transfer	Employee and department transfers, including old and new values (for installed products of type *asset* only).

The event logging functionality is delivered through the AAF and is disabled by default (policies are not activated as delivered). You can create new policies to capture additional event logs based on the delivered ones. Refer to the *PeopleSoft Active Analytics Framework* for detailed documentation on AAF.

See “Understanding AAF” (Automation and Configuration Tools).

History - Related Transactions

Click the Installed Product - History: Related Transactions page to view the cases and services orders that are associated with the installed product.

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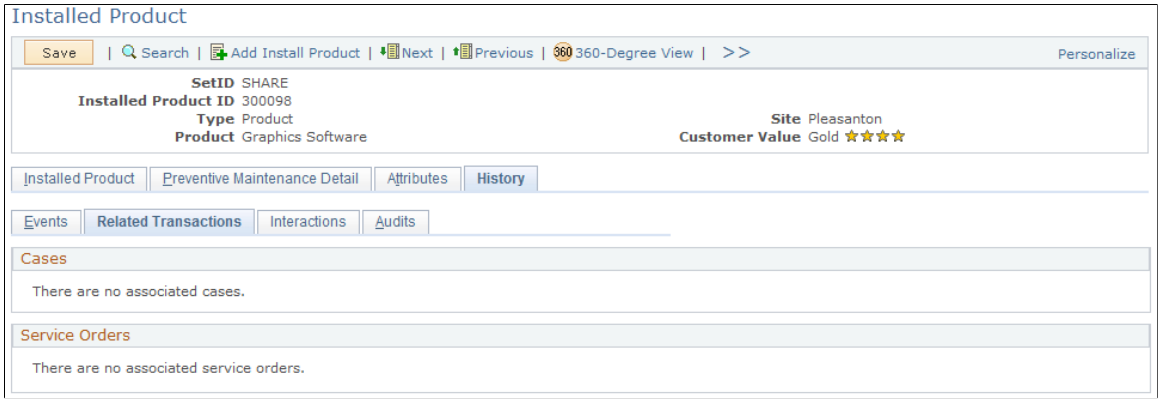
This example illustrates the fields and controls on the Installed Product - History: Related Transactions page.



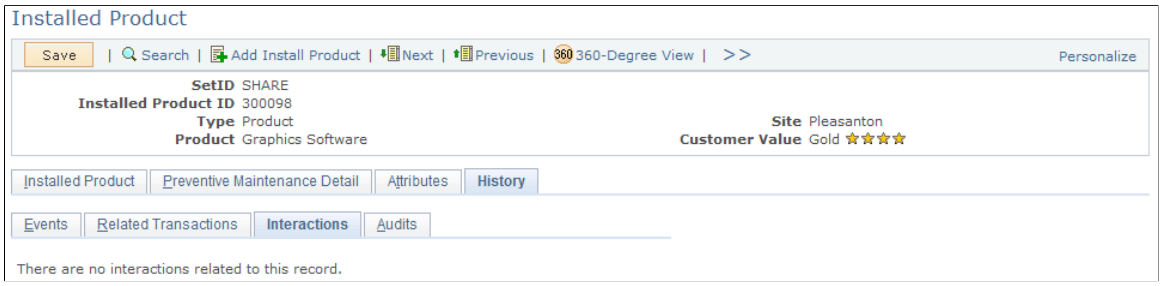
This page displays summary information for each related transaction. Click the ID link to transfer to the corresponding transaction record. As delivered, the section for change requests is available only to installed products of type *asset*.

For performance and usability purposes, each section displays a maximum of 10 transactions at a time. If the installed product is associated with more than 300 counts of the same type of transaction, only the first 300 appear.

History - Interactions

Click the Installed Product - History: Interactions page to view the summary information of all interactions (for example, phone and email correspondence) that have been created for the installed product.

This example illustrates the fields and controls on the Installed Product - History: Interactions page.



Click the **Go To Interaction Detail** button to access the Interaction page to view detailed information about the interaction.

History - Audits

Click the Installed Product - History: Audits page to display changes to the records and fields that are associated with the installed product.

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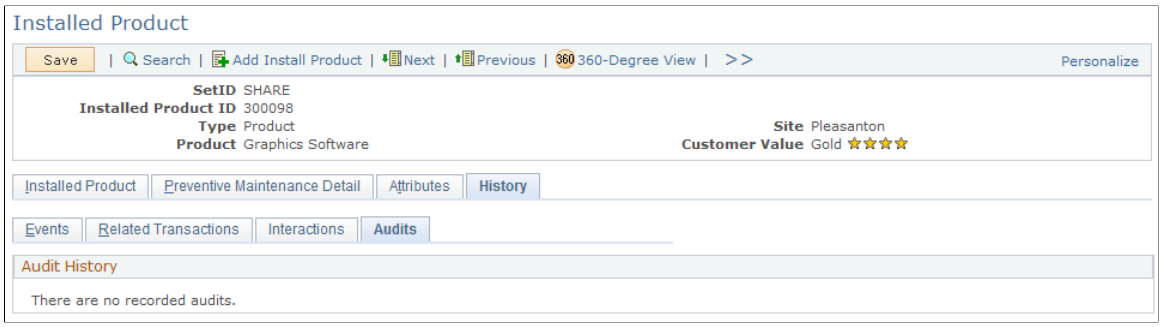
This example illustrates the fields and controls on the Installed Product - History: Audits page.



The system displays previous and new values for the fields that have changed. The system displays all fields from both the installed product main record as well as the installed product status record.

Note: At delivery, auditing is turned off by default. It must be enabled using PeopleSoft Application Designer. The audit record for Installed Product is RF_INST_PROD_AT. This record contains the fields from the records on which auditing must be enabled, if desired: RF_INST_PROD (the main installed product record), RF_INST_PROD_ST (the status record), and RF_INST_PROD_PM (the preventive maintenance record).

See “Understanding Audit Information” (Application Fundamentals).

Viewing Installed Product Hierarchies

This section discusses how to view the installed product hierarchy.

Page Used to View the Installed Product Hierarchy

Page Name	*Definition Name*	*Usage*
Installed Product Hierarchy Page	RF_INSTPROD_VH_SEC	View the installed products that meet the customer or internal worker, site, product, serial number, asset tag, and department criteria that is available on the source page. For the installed products that the system returns, you can also view record status and parent, child, and sibling relationships to other installed products.

Installed Product Hierarchy Page

Use the Installed Product Hierarchy page (RF_INSTPROD_VH_SEC) to view the installed products that meet the customer or internal worker, site, product, serial number, asset tag, and department criteria that is available on the source page.

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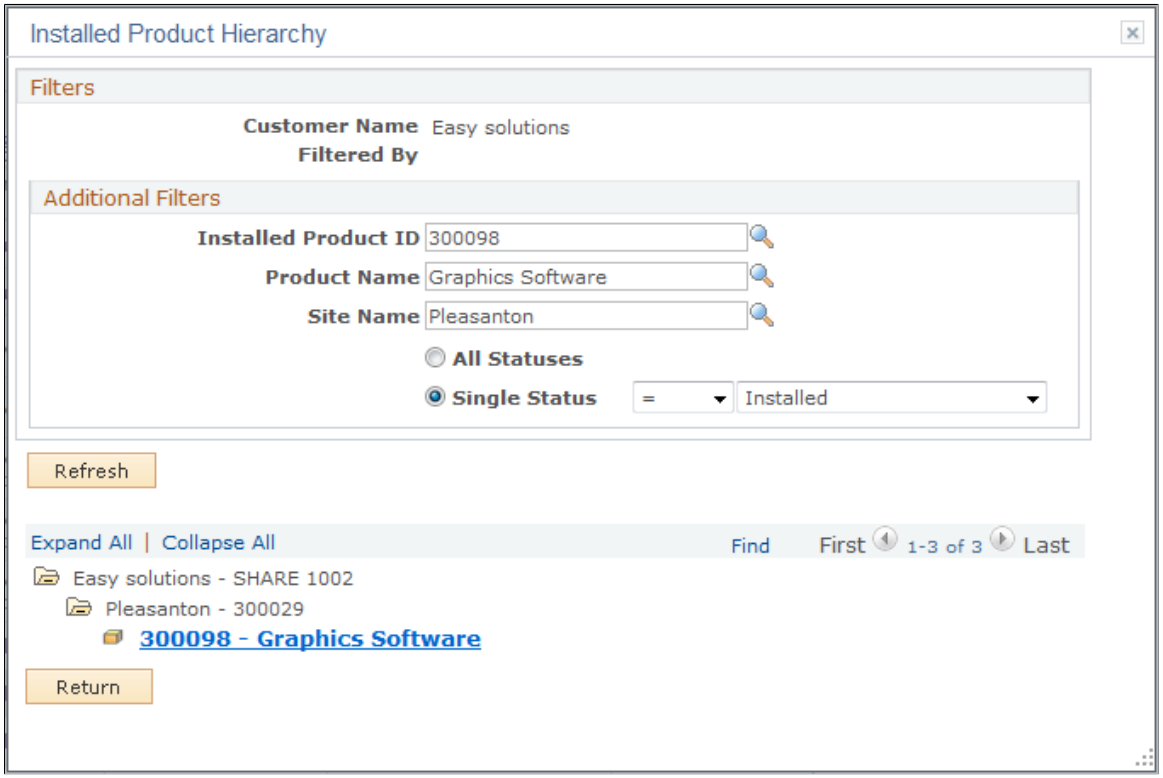
For the installed products that the system returns, you can also view record status and parent, child, and sibling relationships to other installed products.

Navigation:

Click the **View Hierarchy** button from the Installed Product, Service Order, My Service Order, Support Case, HelpDesk Case, RMA (return material authorization), Site (under Customers CRM), Product Registration Installed Assets, Installed Products (search), Installed Assets (search), Customer 360 Degree View, Worker 360 Degree View, Order Capture Entry, Self-Service Support Case, and Self-Service HelpDesk Case pages.

This example illustrates the fields and controls on the Installed Product Hierarchy page.



The initial display of the installed product hierarchy presents the parent-child relationships of all installed products that belong to a customer identified from the calling component. The hierarchy has a filtering capability that allows you to further refine the display based on installed product ID, product name and site name.

The tree structure shows the **Installed Product ID** (always), **Description** (always), **Site,** and **Department** fields for each installed product that meets the filter criteria. It only displays these fields (**Site, Department,** and **Account**) if they are configured to display when you define the tree setup and department. In addition, these filters are available only if you have PeopleSoft HelpDesk installed. Click the link of an installed product to access the Installed Product page, where you can update information as necessary.

When the tree information requires more space than fits on the page, use the positional links (First, Previous, Next, Last, Left, and Right) at the top of the tree to navigate through the information. Click the folders that appear in the tree to collapse or expand specific sections of the hierarchy.

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Note: This hierarchy is not available for service orders or cases if they are configured to hide installed product information (through the corresponding service order or call center configuration templates). You can turn on additional runtime filters using the Tree Configuration: Department (if PeopleSoft HelpDesk is installed).

Field or Control	*Description*
Filters	Displays the values that are available on the source page that the system used to filter the initial view of the hierarchy.
All Statuses and **Single Status**	Select the status of the installed products that should be included in the hierarchical view. **Note:** If you select **Single Status,** you can also use either the equal to (=) or not equal to (not =) operator to select a status for which you want to search for a product.
Refresh	Click to update the display after specifying alternate status values.
<installed product number and description>	Click the link to access the corresponding installed product record.

Mapping and Reconciling Asset Information

Note: The Product Mapping for Hardware Assets and Asset Reconciliation pages are only relevant for users who are implementing asset integration with FMS.

Pages Used to Map and Reconcile Asset Information

Page Name	*Definition Name*	*Usage*
Product Mapping for Hardware Assets Page	RF_PROD_MAP	Associate a match for non-null fields to create a new installed asset on the CRM side.
Asset Reconciliation Page	RF_ASSET_RECON	Display all possible matching CRM entries and provide action buttons to either merge or create new CRM assets.

Prerequisites

Before you can access your third-party asset management application from within PeopleSoft HelpDesk, you must first:

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- Install a third-party asset management application.
- Install the third-party software on the computers that need to be discovered.
- Install the third-party remote control software on the computers that need to be remotely controlled.
- Update the Portal CREF information to point to the correct URL for your environment.

  See *PeopleTools: Portal Technology*

Note: Refer to the vendor's documentation or ask your consultant for advice on setting up an integration with PeopleSoft CRM. Refer to the Oracle corporate website (under the Partners section) for a list of oracle-validated integrations and independent software vendors (ISVs).

Terms and Definitions

This section discusses common terms used in this topic.

Terms

These terms are used throughout this document:

Field or Control	*Description*
Asset	Any technology device, such as a computer, peripheral, or router.
Remote Control	The ability to remotely take control of a computer system.
ITAM	Information Technology Asset Management.

Enabling Integration to the Asset Repository Module in PeopleSoft Financials

The option for enabling asset integration between PeopleSoft CRM and Financials is available as a general option in display templates that are created for installed assets. As delivered, this option is disabled in the display template delivered for installed assets.

To enable asset integration:

1. Navigate to **Set Up CRM** > **Common Definitions** > **Component Configuration** > **Display Templates** > **Display Template Details**. Open a display template for installed assets.

   If you want to enable the integration in the delivered display template for installed assets, look it up by the name *CORE_IP_ASSET*, which is created using the RC_HELPDESK display template family code and the RF_INST_PRODUCT component.

2. On the Display Template page that appears, click the **Installed Product** page link. After the page refreshes, click the **Show Section Details** link at the bottom of the page to expand the section.

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This step ensures that all the asset-related fields that will appear as a result of the integration are already enabled for display before the integration is enabled.

3. Scroll to the PRODUCT section, and make sure that these fields are enabled for display: **Asset Type, Validated, Asset Subtype,** and **Transfer.** Save the change.

4. Scroll to the beginning of the page. Click the **Return** link. Click OK to the system message about saving the display template.

5. On the Display Template page, locate a general option called *Asset Integration.* Change its value to *Yes,* and save the change.

See “Display Template Page” (Automation and Configuration Tools).

See *PeopleTools: Integration Broker*

Running the Initial Data Synchronization

To synchronize all desired asset data between Financials and CRM on a newly implemented system:

1. Use PeopleTools Integration Broker to activate the location, department, and worker messages.

2. In the Financials application, navigate to **Enterprise Components** > **Integration Definitions** > **Initiate Processes** > **Full Data Publish**.

3. Publish using these messages in this order:

   - Manufacturer data: MANUFACTURER_FULLSYNC
   - Asset Subtype data: COPY_AM_SUBTYPE
   - Asset Full Sync data: COPY_IT_ASSET

4. Inactivate the FULLSYNC messages and activate the corresponding SYNC messages.

Processing the messages in the order given creates records for these data, in this order:

1. Employee, department, and location data.

2. Manufacturer data and asset subtype data.

3. Financials asset repository data.

Records created in this order ensure that the data is validated.

Synchronizing data in this order ensures that the relevant data referred to in the Financials assets, such as department, employee, and manufacturer, has corresponding entries on the CRM side. Without such corresponding data on the CRM side, the full synchronization might attempt to create a CRM-installed asset for an employee who does not exist in CRM, which would cause an error.

See *PeopleSoft FSCM Maintenance Management*

See *PeopleSoft Application Integration Framework*

See *PeopleSoft Integration Interfaces*

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See *PeopleTools: PeopleSoft Integration Broker*

See “Data Integrations” (Business Object Management).

See “Integrating with PeopleSoft Financial Management Services” (PeopleSoft Integrated FieldService).

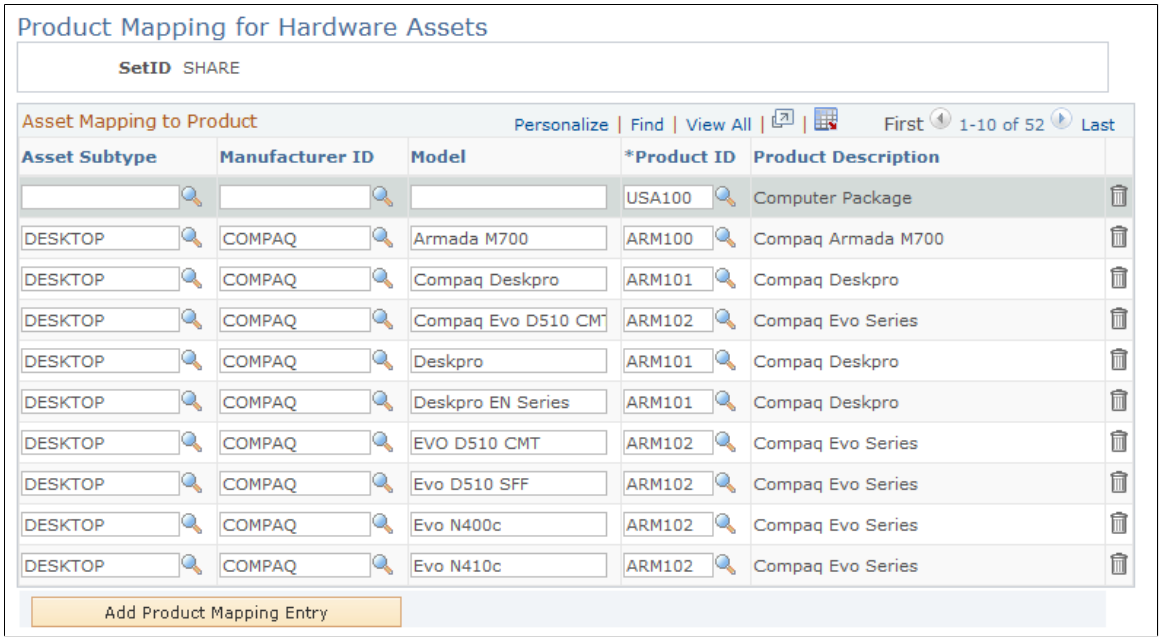
Product Mapping for Hardware Assets Page

Use the Product Mapping for Hardware Assets page (RF_PROD_MAP) to associate a match for non-null fields to create a new installed asset on the CRM side.

Navigation:

Set Up CRM > **Common Definitions** > **Integration Rules** > **Integration Defaults** > **Asset Product Mapping** > **Product Mapping for Hardware Assets**

This example illustrates the fields and controls on the Product Mapping for Hardware Assets page.



Use this page to map a combination of the three FMS fields (**Asset Subtype, Manufacturer,** and **Model**) to a CRM product ID value as part of the asset integration between the two systems.

On all installed product entries, CRM requires a product ID, but FMS does not associate a product ID to its asset entries. The map you create should specify how the CRM system should assign a product ID to each CRM-installed asset entry that is created from FMS asset data.

The **Asset Subtype, Manufacturer,** and **Model** fields on this page refer to the identically defined fields from PeopleSoft FMS Asset Management.

Note: To capture product asset information from FMS that does not map to the installed product entries in CRM, leave the **Asset Subtype, Manufacturer,** and **Model** fields blank in the first row on this page and only enter a **Product ID.** When no matches are found on asset data in CRM, the system provides the information from FMS to this product ID by default.

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Asset Reconciliation Page

Use the Asset Reconciliation page (RF_ASSET_RECON) to display all possible matching CRM entries and provide action buttons to either merge or create new CRM assets.

Navigation:

HelpDesk > **Asset Reconciliation** > **Asset Reconciliation**

Select the option associated with the asset that best matches the data that has come over from your FMS database. This information appears in the top portion of the page. Then, click one of the buttons at the bottom of the page to either merge the selected asset or create a new asset.

Field or Control	*Description*
Merge Selected Installed Asset	Click this button if the FMS data matches the asset data on the CRM side and you want to create a CRM-installed asset row based on the values from the selected FMS row.
Create New Installed Asset	Click this button if the FMS data does not refer to any asset on the CRM side and you want to create a CRM-installed asset row based on the values from the selected FMS row.

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