
PeopleSoft CRM 9.2: Business Object Management

November 2025

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Contents

| | |
|------------------------------------------------------------------------------------|-------------|
| Preface: Preface..... | xiii |
| Understanding the PeopleSoft Online Help and PeopleBooks..... | xiii |
| Hosted PeopleSoft Online Help..... | xiii |
| Locally Installed PeopleSoft Online Help..... | xiii |
| Downloadable PeopleBook PDF Files..... | xiii |
| Common Help Documentation..... | xiii |
| Field and Control Definitions..... | xiv |
| Typographical Conventions..... | xiv |
| ISO Country and Currency Codes..... | xv |
| Region and Industry Identifiers..... | xv |
| Translations and Embedded Help..... | xvi |
| Using and Managing the PeopleSoft Online Help..... | xvi |
| PeopleSoft CRM Related Links..... | xvi |
| Contact Us..... | xvi |
| Follow Us..... | xvii |
| Chapter 1: Getting Started with CRM Business Object Management..... | 19 |
| CRM Business Object Management Overview..... | 19 |
| CRM Business Object Integrations..... | 19 |
| CRM Business Object Implementation..... | 20 |
| Chapter 2: Understanding Business Object Relationship Model Components..... | 21 |
| Business Object Relationship Modelling..... | 21 |
| BORM Architecture..... | 21 |
| Business Object Components..... | 21 |
| Roles..... | 22 |
| Relationships..... | 22 |
| Customers and Business Contacts..... | 23 |
| Contact Information for Business Objects..... | 23 |
| Business Object Searches..... | 24 |
| Basic Data Tables..... | 24 |
| Business Object Profiles..... | 25 |
| Chapter 3: Defining Control Values for Business Objects..... | 27 |
| Understanding Business Object Controls..... | 27 |
| Business Object Types..... | 27 |
| Role Types and Role Categories..... | 28 |
| Relationship Types and Relationship Categories..... | 30 |
| Contact Information Entries..... | 32 |
| Contact Method Types and Contact Method Purpose Types..... | 33 |
| Component Transfer Navigation..... | 34 |
| Defining Business Object and Name Types..... | 35 |
| Pages Used to Define Business Object and Name Types..... | 36 |
| Business Object Type Page..... | 36 |
| Business Object Name Type Page..... | 37 |
| Defining Role Types and Role Categories..... | 38 |
| Pages Used to Define Role Types and Categories..... | 38 |
| Role Type Page..... | 38 |
| Role Category Page..... | 41 |

| | |
|-----------------------------------------------------------------------------------|-----------|
| Defining Relationship Types and Relationship Categories..... | 42 |
| Pages Used to Define Relationship Types and Relationship Categories..... | 43 |
| Relationship Type Page..... | 43 |
| Relationship Category Page..... | 45 |
| Configuring Address Books..... | 46 |
| Page Used to Configure Address Books..... | 46 |
| Address Book Configuration Page..... | 46 |
| Setting Up Contact Methods..... | 47 |
| Pages Used to Set Up Contact Methods..... | 48 |
| Contact Method Use Page..... | 48 |
| Contact Method Type Page..... | 48 |
| Contact Method Purpose Type Page..... | 52 |
| Defining Component Transfer Navigation..... | 52 |
| Pages Used to Define Component Transfer Navigation..... | 53 |
| Component Navigation - Description Page..... | 53 |
| Defining Segment Codes..... | 54 |
| Page Used to Define Segment Codes..... | 54 |
| Segment Code Page..... | 54 |
| Defining Industries..... | 55 |
| Page Used to Define Industries..... | 55 |
| Industry Page..... | 55 |
| Defining National ID Types..... | 56 |
| Page Used to Define National ID Types..... | 56 |
| National Identification Type Page..... | 56 |
| Defining Customer Groups..... | 57 |
| Page Used to Define Customer Groups..... | 57 |
| Customer Group Table Page..... | 57 |
| Defining Customer Data Management System Options..... | 58 |
| Page Used to Define Customer Data Management System Options..... | 58 |
| Customer Data Management System Options Page..... | 58 |
| Defining Basic Data Mappings..... | 61 |
| Pages Used to Define Basic Data Mappings..... | 61 |
| Basic Data Mapping Page..... | 61 |
| Basic Data Mapping Cloning Page..... | 62 |
| Chapter 4: Defining Name and Address Information for Business Objects..... | 65 |
| Understanding Name and Address Information in CRM..... | 65 |
| Common Elements Used to Define Basic Data Mappings..... | 65 |
| Business Object Names in PeopleSoft CRM..... | 66 |
| Address Books in CRM..... | 66 |
| Contact Information on CRM Components..... | 66 |
| Updating Name Information..... | 68 |
| Pages Used to Update Name Information..... | 68 |
| More Names Page..... | 69 |
| Managing Summary Contact Information..... | 70 |
| Pages Used to Manage Summary Contact Information..... | 70 |
| Maintaining Contact Information for Business Objects..... | 70 |
| Pages Used to Maintain Contact Information..... | 70 |
| Contact Info Page..... | 71 |
| Address Book Page..... | 73 |
| Address Search Result List Page..... | 74 |
| Update Address Page..... | 75 |

| | |
|-------------------------------------------------------------------------------------------------------|-----------|
| Update Phone Page..... | 76 |
| Update Email Page..... | 77 |
| Defining Customer Contacts..... | 78 |
| Pages Used to Define Customer Contacts..... | 79 |
| Maintaining the Contact List..... | 79 |
| Create Contact of <object> Page..... | 80 |
| Defining Customer Sites..... | 83 |
| Pages Used to Define Sites..... | 83 |
| Sites Page..... | 84 |
| Chapter 5: Defining Purchasing Options for Companies, Consumers, and Sites..... | 85 |
| Understanding Purchasing Options..... | 85 |
| Defining Purchasing Options for Customers..... | 86 |
| Pages Used to Define Purchasing Options for Customers..... | 86 |
| Purchasing Info Page..... | 86 |
| Selecting Purchasing Options for Customer Addresses..... | 89 |
| Pages Used to Select Purchasing Options for Customer Addresses..... | 89 |
| Contact Info Page..... | 89 |
| Selecting Purchasing Options for Customer Contacts..... | 90 |
| Pages Used to Select Purchasing Options for Customer Contacts..... | 90 |
| Contact Info Page..... | 91 |
| Maintain Contact Page..... | 91 |
| Selecting Purchasing Options for Customer Sites..... | 91 |
| Pages Used to Select Purchasing Options for Customer Sites..... | 91 |
| Contact Info Page..... | 92 |
| Chapter 6: Defining Tax Exempt Certificate Information for Companies, Consumers and Sites..... | 93 |
| Understanding Tax Exempt Certificates..... | 93 |
| Working with Tax Exempt Certificate Information..... | 93 |
| Page Used to Work with Tax Exempt Certificate Information..... | 93 |
| Tax Exempt Certificate Page..... | 93 |
| Chapter 7: Working with Business Object Profiles..... | 95 |
| Understanding Profiles..... | 95 |
| Profile Data in the CDM..... | 97 |
| Common Elements Used When Working With Profiles..... | 97 |
| Specifying a Profile Prefix..... | 98 |
| Page Used to Specify a Profile Prefix..... | 98 |
| Profile Setup Page..... | 98 |
| Creating a Profile Request..... | 99 |
| Pages Used to Create a Profile Request..... | 99 |
| Understanding Profile Requests..... | 99 |
| Profile Page..... | 100 |
| Profile Fields - Field Summary Page..... | 102 |
| Profile Fields - Field Detail Page..... | 105 |
| Modifying Active Profiles..... | 107 |
| Profile - Marketing Center Page..... | 108 |
| Registering a Profile..... | 109 |
| Pages Used to Register a Profile..... | 111 |
| Profiles Page..... | 111 |
| Profile Registration - Profile Page..... | 112 |
| Profile Registration - Profile Fields Page..... | 113 |
| Setting Up Profile Groups..... | 115 |

| | |
|--------------------------------------------------------------|------------|
| Pages Used to Set Up Profile Groups..... | 115 |
| Define Profile Group Page..... | 115 |
| Define Profile Group - Add Profile Field Page..... | 116 |
| Assign Profile Group Display Page..... | 117 |
| Assign Profile Group Display - Edit Condition Page..... | 117 |
| Viewing and Updating Profile Data..... | 118 |
| Pages Used to View and Update Profile Data..... | 118 |
| More Info Page..... | 119 |
| Inserting and Updating Rows in Profiles..... | 119 |
| Page Used to Insert and Update Rows in Profiles..... | 119 |
| Manage Profile Updates Page..... | 119 |
| Chapter 8: Working with the Relationship Viewer..... | 125 |
| Understanding the Relationship Viewer..... | 125 |
| Purpose of the Relationship Viewer..... | 125 |
| Types of Relationships..... | 125 |
| Implicit and Explicit Relationships..... | 126 |
| Roles in the Relationship Viewer..... | 126 |
| PeopleSoft CRM Sample Relationship Views..... | 126 |
| Configuring Relationship Views..... | 127 |
| Page Used to Configure Relationship Views..... | 128 |
| Configure Relationship Views Page..... | 128 |
| Configuring the Relationship Viewer..... | 130 |
| Pages Used to Configure the Relationship Viewer..... | 131 |
| Role Type - Default Views Page..... | 131 |
| Role Priority - Role Priorities Page..... | 133 |
| Viewing and Maintaining Relationships and Roles..... | 133 |
| Pages Used to View and Maintain Relationships and Roles..... | 133 |
| Relationship Viewer Page..... | 134 |
| Maintain Roles Page..... | 136 |
| Chapter 9: Defining Company Business Objects..... | 139 |
| Understanding the Company Component..... | 139 |
| Company Information..... | 139 |
| Defining Company Information..... | 140 |
| Pages Used to Define Company Information..... | 140 |
| Company Search Page..... | 141 |
| Company - Summary: Summary Page..... | 141 |
| Company - Summary: Details Page..... | 143 |
| Company - Account Team Page..... | 146 |
| Company - Tasks Page..... | 146 |
| Company - Call Reports Page..... | 146 |
| Company - Notes Page..... | 147 |
| Company - Contact Info Page..... | 147 |
| Company - Relationships Page..... | 147 |
| Company - More Info Page..... | 147 |
| Company - Tax Exempt Certificate Page..... | 147 |
| Defining Company Sites..... | 149 |
| Pages Used to Define Company Sites..... | 149 |
| Defining Company Contacts..... | 149 |
| Pages Used to Define Company Contacts..... | 149 |
| Modeling Corporate Hierarchy..... | 150 |
| Pages Used to Model Corporate Hierarchy..... | 150 |

| | |
|------------------------------------------------------------------|------------|
| Understanding Corporate Hierarchy..... | 150 |
| Understanding Corporate Hierarchy Participation Percentages..... | 151 |
| Corporate Hierarchy Page..... | 151 |
| Corporate Hierarchy: Extract Hierarchy Page..... | 152 |
| Chapter 10: Defining Site Business Objects..... | 155 |
| Understanding Sites..... | 155 |
| Setting Up Site Types..... | 156 |
| Page Used to Set Up Site Types..... | 156 |
| Maintaining General Site Information..... | 156 |
| Pages Used to Maintain General Site Information..... | 156 |
| Site - Site: Primary Page..... | 157 |
| Site - Site: Name Page..... | 160 |
| Site - Site: Purchasing Info Page..... | 160 |
| Site - Site: Tax Exempt Certificate Page..... | 160 |
| Site - Contact Info Page..... | 160 |
| Site - Notes Page..... | 160 |
| Maintaining Site Contacts..... | 161 |
| Pages Used to Define Site Contacts..... | 161 |
| Defining Site Relationships..... | 161 |
| Viewing Installed Products for a Site..... | 161 |
| Pages Used to View Installed Products for a Site..... | 161 |
| Chapter 11: Defining Person Business Objects..... | 163 |
| Understanding Persons..... | 163 |
| Sources of Person Information..... | 163 |
| Persons..... | 163 |
| Consumers and Contacts..... | 164 |
| Workers..... | 166 |
| Persons of Interest..... | 166 |
| Configuring the Person Component..... | 166 |
| Pages Used to Configure the Person Component..... | 167 |
| Configure Person Component Page..... | 167 |
| Person of Interest Type Page..... | 169 |
| Defining Person Information..... | 170 |
| Pages Used to Define Person Information..... | 170 |
| Person (<Role>) - Person: Primary Page..... | 171 |
| Person (<Role>) - Person: Details Page..... | 174 |
| Person (<Role>) - User Profiles Page..... | 175 |
| Person (<Role>) - Person: Credit Cards Page..... | 177 |
| Person (<Role>) - Tasks page..... | 178 |
| Person (<Role>) - Call Reports Page..... | 178 |
| Person (<Role>) - Notes Page..... | 179 |
| Person (<Role>) - Contact Info Page..... | 179 |
| Person (<Role>) - Relationships Page..... | 179 |
| Person (<Role>) - More Info Page..... | 179 |
| Defining Information for Business Contacts..... | 179 |
| Pages Used to Define Information for Business Contacts..... | 179 |
| Defining Consumer Information..... | 180 |
| Pages Used to Define Consumer Information..... | 180 |
| Person (Consumer) - Person: Tax Exempt Certificate Page..... | 181 |
| Person (Consumer) - Person: Purchasing Page..... | 181 |
| Person (Consumer) - Account Team Page..... | 181 |

| | |
|----------------------------------------------------------------------------------------------|------------|
| Person (Consumer) - Contact Info Page..... | 182 |
| Defining Person of Interest Information..... | 182 |
| Deleting An Employee..... | 182 |
| Pages Used to Delete an Employee..... | 183 |
| Employee Delete Page..... | 183 |
| Chapter 12: Defining Workers..... | 185 |
| Understanding Workers in CRM..... | 185 |
| Workforce Administration..... | 185 |
| Options for Creating Workers..... | 186 |
| Job Information and Effective Dates..... | 187 |
| Creating Workers..... | 189 |
| Pages Used to Create Workers..... | 189 |
| Prerequisites..... | 190 |
| Add Worker: Select Creation Method Page..... | 190 |
| Add Worker: Select Data to Copy Page..... | 191 |
| Create Worker Page..... | 192 |
| Maintaining Worker Information..... | 194 |
| Pages Used to Maintain Worker Information..... | 194 |
| Worker - Worker: Primary Page..... | 196 |
| Worker - Worker: Details Page..... | 197 |
| Worker - Worker: User Profiles Page..... | 197 |
| Worker - Job: Job Details Page..... | 199 |
| Worker - Job: Job Summary Page..... | 202 |
| Worker - Work Schedule Page..... | 203 |
| Worker - Skills and Competencies Page..... | 204 |
| Worker - Assignment Criteria Page..... | 205 |
| Worker - Groups Page..... | 207 |
| Worker - Storage Locations Page..... | 208 |
| Worker - Signature Page..... | 210 |
| Setting Up Foundational Data for Workers..... | 210 |
| Pages Used to Set Up Foundational Data for Workers..... | 211 |
| Location Page..... | 211 |
| Department Page..... | 211 |
| Job Codes Page..... | 212 |
| Cost Categories Page..... | 212 |
| Competencies Page..... | 213 |
| Chapter 13: Working with Predefined Business Object Search and Quick Create Data..... | 215 |
| Understanding Delivered System Data for BO Search and Quick Create..... | 215 |
| Field Definitions..... | 215 |
| Quick Create Definitions and Templates..... | 223 |
| Search Roles..... | 223 |
| Search Definitions..... | 223 |
| Criteria Fields..... | 223 |
| Adapter Definitions..... | 224 |
| Chapter 14: Using Business Object Search and Quick Create Functionality..... | 225 |
| Understanding the Business Object Search and Quick Create Process..... | 225 |
| Business Object Search..... | 225 |
| Customer Identification..... | 225 |
| Quick Create Functionality..... | 226 |
| BO Search and Quick Create Runtime Example..... | 226 |
| Searching for Business Objects..... | 227 |

| | |
|------------------------------------------------------------------------------------------|------------|
| Pages Used to Search for Business Objects..... | 227 |
| Customer Information Subpage..... | 228 |
| Search For <object> Page..... | 228 |
| Creating Business Objects by Using the Quick Create Component..... | 230 |
| Page Used to Create Business Objects by Using Quick Create Functionality..... | 230 |
| Create <Quick Create Definition Name> Page..... | 230 |
| Chapter 15: Setting Up Business Object Search and Quick Create..... | 235 |
| Understanding BO Search and Quick Create Setup..... | 235 |
| Common Elements for BO Search and Quick Create Setup..... | 235 |
| BO Search Runtime Processes..... | 236 |
| BO Search and Quick Create Setup..... | 237 |
| Delivered Definitions..... | 237 |
| Adding and Modifying BO Search and Quick Create Definitions..... | 237 |
| Pages Used to Add or Modify Search Definitions..... | 238 |
| Field Page..... | 239 |
| Role Page..... | 242 |
| Search Record Page..... | 243 |
| Template Page..... | 244 |
| Relationships Page..... | 246 |
| Quick Create Page..... | 247 |
| Search Role Page..... | 248 |
| Search Page..... | 252 |
| Criteria Page..... | 255 |
| Adapter Page..... | 257 |
| Sections Page..... | 259 |
| Defining Labels..... | 263 |
| Chapter 16: Defining Ad Hoc Business Objects..... | 265 |
| Understanding Ad Hoc Business Objects..... | 265 |
| Defining Ad Hoc Business Objects..... | 265 |
| Pages Used to Define Ad Hoc Business Objects..... | 266 |
| Business Object - Business Object Page..... | 266 |
| Business Object - Relationships Page..... | 266 |
| Chapter 17: Managing Enterprise Integration for PeopleSoft CRM..... | 269 |
| Understanding Enterprise Integration Technology..... | 269 |
| EIPs in PeopleSoft CRM..... | 269 |
| PeopleSoft CRM Foundation EIPs..... | 271 |
| Application Messages..... | 276 |
| Data Mapping for Application Messages..... | 277 |
| Integration with PeopleSoft HCM, PeopleSoft Campus Solutions or Third-Party HR Data..... | 278 |
| Person Basic Fullsync and Person Basic Sync..... | 279 |
| Workforce Fullsync and Workforce Sync..... | 282 |
| Campus Solutions EIPs..... | 283 |
| Pers POI Sync..... | 283 |
| Customer Data Model EIP Sequence..... | 283 |
| Implementation Using Fullsyncs..... | 284 |
| Data Integrations..... | 285 |
| Customer and Contact Data Integration with PeopleSoft FSCM..... | 286 |
| Worker Data Integration with Third-Party Systems..... | 290 |
| Product Data Integration..... | 290 |
| Bill and Payment Data Integration..... | 291 |
| Performance Considerations..... | 292 |

| | |
|-------------------------------------------------------------------------------------------|------------|
| Setting Up Defaults for Integrating Customer and Contact Information..... | 293 |
| Pages Used to Set Up Default Values for Integrating Customer and Contact Information..... | 293 |
| Collector Page..... | 294 |
| Credit Analyst Page..... | 294 |
| Support Team Code Page..... | 294 |
| Interface Defaults Page..... | 295 |
| Name Type Options Page..... | 295 |
| General Options Page..... | 296 |
| Market-Enabling Company, Consumer, Site, and Contact EIPs..... | 296 |
| Pages Used to Market-Enable Company, Consumer, Site, and Contact EIPs..... | 296 |
| Market Control Codes Page..... | 297 |
| Market Installation Options Page..... | 297 |
| Build CDM Interface Records Page..... | 298 |
| Establishing Primary ID Databases..... | 298 |
| Pages Used for Establishing Primary ID Databases..... | 298 |
| Prerequisites..... | 298 |
| Primary ID DB Setup Page..... | 298 |
| XML Test Utility Page..... | 299 |
| Mapping Message Data to PeopleSoft CRM Records and Fields..... | 301 |
| Page Used to Map Message Data to PeopleSoft CRM Records and Fields..... | 301 |
| Message Data Mapping Page..... | 301 |
| Chapter 18: Importing Data into PeopleSoft CRM..... | 307 |
| Understanding the Data Import Application Engine Process (RBIMPORT)..... | 307 |
| Prerequisites..... | 307 |
| Data Import Process Steps..... | 307 |
| Matching SQL..... | 309 |
| When to Use the Basics AE Process to Load Basic Data..... | 309 |
| Setting Up Data Import Global Settings..... | 310 |
| Page Used to Set Up Data Import Global Settings..... | 310 |
| Data Import Global Setup Page..... | 310 |
| Defining Data Import Templates..... | 312 |
| Pages Used to Define Data Import Templates..... | 313 |
| Data Import Page..... | 314 |
| Data Import - Step 1: Define Import Template Page..... | 315 |
| Data Import - Step 2: Define Import File Page..... | 317 |
| Data Import - Step 3: Mapping Page..... | 319 |
| Specify Concatenation Page..... | 323 |
| Data Import - Step 4: Matching Page..... | 323 |
| Save Confirmation Page..... | 325 |
| Editing Matching SQL..... | 325 |
| Pages Used to Edit Matching SQL..... | 326 |
| Edit Matching SQL Page..... | 326 |
| Edit SQL page for Data Import Page..... | 326 |
| Running the Data Import Application Engine Process (RBIMPORT)..... | 327 |
| Pages Used to Run the Data Import Application Engine Process (RBIMPORT)..... | 327 |
| Data Import Page..... | 327 |
| Viewing the Data Import Process Status..... | 331 |
| Pages Used to View the Data Import Process Status..... | 331 |
| Data Import Page..... | 331 |
| View Import Statistics Page..... | 332 |
| Viewing the Data Import Process Error File..... | 332 |

| | |
|----------------------------------------------------------------------|-----|
| Running the Basics AE Process..... | 333 |
| Page Used to Run the Basics AE Process..... | 333 |
| Understanding the Basics AE Process..... | 333 |
| Disabling Unnecessary Roles, Relationships, and Contact Methods..... | 334 |
| Optimizing the Database for Performance..... | 335 |
| Application Engine Request Page..... | 337 |

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 PeopleSoft Online Help

If you're setting up an on-premises 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. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the [Oracle Software Delivery Cloud](#).

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, 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.

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.

| <i>Typographical Convention</i> | <i>Description</i> |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Key+Key | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W , hold down the Alt key while you press the W key. |
| . . . (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. |

| <i>Typographical Convention</i> | <i>Description</i> |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ⇒ | 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.

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.

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

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Getting Started with CRM Business Object Management

CRM Business Object Management Overview

CRM represents customers (companies, sites, consumers), contacts of customers, and workers as business objects in the customer data model. Business objects can have different roles attached to them. Depending on the role that a business object plays, it can require different types of data and can participate in different relationships with other business object-role combinations.

CRM provides:

- Setup tables that define possible business object roles and relationships.
- Components that enable you to manage data, roles, and relationships for customers in the BORM.
- Business object searches that enable you to locate an existing business object to use in transactions.
- The capability to quickly create a business object immediately by entering essential information.

CRM Business Object Integrations

CRM applications integrate with each other and with other external systems. Application-specific integrations are discussed in the application-specific documentation. The following integrations apply to business objects in the BORM:

- Integration with PeopleSoft Human Capital Management or other similar systems enables you to synchronize CRM employee records with the system of record for human resources (HR) data.
- Integration with PeopleSoft Supply Chain Management (SCM) or other similar systems enables you to synchronize customer data that is required for applications within CRM such as Sales, Field Service, and Order Capture.
- Integration with SCM and Financial Management Solutions enables billing information and payment information that is associated with customers to appear in the PeopleSoft CRM 360-Degree View.
- The Credit Card EIP (enterprise integration point) enables you to integrate with third-party credit card authorization and payment vendors in Support and the collaborative selling applications.

Refer to the implementation topics in this documentation for detailed information. You can find supplemental information about third-party application integrations on the My Oracle Support website.

CRM Business Object Implementation

Setup Manager enables you to generate a list of setup tasks based on the features that you are implementing. Setup tasks include:

- A list of components that you must set up.

This list is the order in which you must set up the components and enter data into them.

- Links to the corresponding documentation.

CRM also provides component interfaces (CIs) to help you load data from an existing system into CRM tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

See *Application Fundamentals*.

Other Sources of Information

In the planning phase of implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

See also product documentation for *PeopleTools: Component Interfaces* and *PeopleTools: Setup Manager*.

Chapter 2

Understanding Business Object Relationship Model Components

Business Object Relationship Modelling

These topics discuss:

- BORM architecture.
- Business object components.
- Roles.
- Relationships.
- Customers and business contacts.

BORM Architecture

The business object relationship model (BORM) provides a flexible architecture for establishing and maintaining the relationships that form the foundation of the business model. You can support business-to-business and business-to-consumer models within a single implementation of the BORM.

A business object is any entity for which you store data and that participates in one or more business relationships. The primary key on the business object record, the `BO_ID`, acts as a pointer to the entity records. This design enables you to create and maintain relationships between different entities without regard to their various key structures.

Business objects participate in relationships with other business objects according to their assigned roles. Business object types categorize business objects and enable you to define roles for each type. The business object record also provides a common field (`BO_NAME`) for naming different entities that participate in relationships. For a relationship to be meaningful to users, you should associate a name with each relationship participant.

You can add organization-specific entities to the system and manage relationships for these new entities in the core PeopleSoft Customer Relationship Management (PeopleSoft CRM) applications with little or no application customization.

Business Object Components

PeopleSoft Customer Relationship Management (CRM) delivers a set of transactions, or components, for creating business objects:

- Company

- Site
- Person
- Worker

Every business object that you create in a system component has a type of either Organization or Individual. The Organization business objects are either companies or sites; and the Individual business objects are persons. The Person business object can represent any or all of the following: a consumer, a contact, or a worker, depending on the role that is associated with it.

Note: You can create a worker directly within the Worker component or by adding the Worker role to a Person business object.

Related Links

[Understanding the Company Component](#)

[Understanding Persons](#)

[Understanding Sites](#)

[Understanding Ad Hoc Business Objects](#)

[Understanding Workers in CRM](#)

Roles

You must associate a business object with a role before it can participate in a relationship. In the business object relationship model, the roles that a business object can play are tracked in the Business Object Role table (BO_ROLE). Delivered roles are associated with company, consumer, site, contact, and worker business objects. You can define additional roles.

In most cases, the way that you create the business object determines its role. For example, when you create a business object in the Company component, the Company role is automatically assigned to it.

Related Links

[Defining Role Types and Role Categories](#)

[Understanding the Relationship Viewer](#)

Relationships

Business object relationship records (BO_REL) capture a connection between two business objects, each playing a specific role. You create relationships to track and view information about customers. For example, relationships can show the corporate structure of a company and the contacts that you work with at each of the corporate sites.

To establish a relationship between two business objects, you first define relationship type records (BO_REL_TYPE), which define the rules of the relationship, including the role that a business object must have to participate in the relationship, and the number of business objects that can participate in a specific relationship role.

Company, site, person, and worker business objects participate in the delivered relationship types. You can define additional relationship types to support business needs.

Related Links

[Defining Relationship Types and Relationship Categories](#)

[Understanding the Relationship Viewer](#)

Customers and Business Contacts

In the BORM, customers are the company, site, and consumer business objects. When you define any customer to the system, a record is created in the Business Contact (BC) table. This record enables you to define sold to, ship to, or bill to options for customer business objects. You can manage contact information based on the purchasing options—sell to, ship to, or bill to options—that are assigned to the business object.

See [Understanding Purchasing Options](#).

Key Performance Indicators

A key performance indicator represents a customer's overall performance on some criterion, which is usually revenue-generated. Key performance indicators are useful to establish and keep successful relationships with customers—for example, to determine which customers are eligible for special values or promotions.

PeopleSoft Enterprise Performance Management uses customer information that you define as performance criteria to calculate and determine one single key performance indicator. You can represent a key performance indicator value as anything that is meaningful to business users—for example, a category such as gold, silver, or bronze or a calculated number value.

When the key performance indicator value is available in Performance Management, CRM can access it by using integration. When available, this information is displayed in the **Assessment** field on the component details page.

Related Links

[Business Object Relationship Modelling](#)

[Defining Customer Contacts](#)

[Understanding Sites](#)

[Understanding Name and Address Information in CRM](#)

[Defining Customer Contacts](#)

[Mapping Message Data to PeopleSoft CRM Records and Fields](#)

[Understanding Enterprise Integration Technology](#)

Contact Information for Business Objects

Address Book entries are logical groupings to the primary contact methods, or communication channels, for a business object. A contact info entry is similar to a rolodex card and can contain a postal address, one or more email addresses, and up to four phone, fax, or pager numbers. Each business object can have one or more contact info entries set up for different purposes or locations. For example, a consumer might have a contact info entry for both home and work.

When you implement the Customer Relationship Management system, you designate how many contact info entries are available for each organization and individual business object type. At run time, users of the system can select which entry is the primary contact information for the business object and can update the contact methods that is associated with each entry. The primary information appears on component pages.

Related Links

[Understanding Name and Address Information in CRM](#)

[Understanding Sites](#)

[Understanding Persons](#)

Business Object Searches

Business object searches:

- Enable Customer Relationship Management users to locate specific business objects for display or update.
- Are called from system prompts and the Business Object Search component.
- Return a set of selected business objects that meet the search criteria.

Delivered system data includes a set of search definitions that support functionality in the PeopleSoft core applications. You can modify these search definitions or create additional definitions.

Related Links

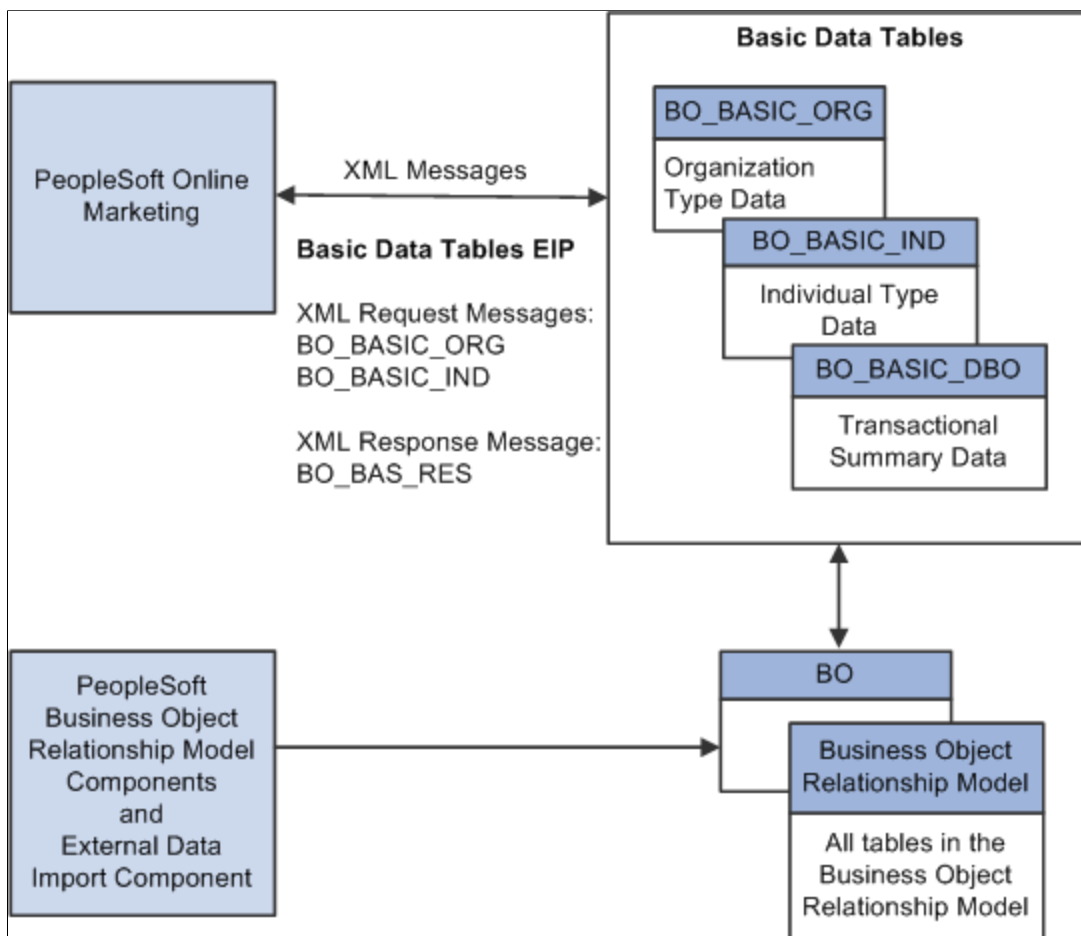
[Understanding Delivered System Data for BO Search and Quick Create](#)

Basic Data Tables

The basic data tables contain a subset of information from the BORM tables. These tables assist with integration between the different CRM products. Currently, PeopleSoft Online Marketing and the external import functionality use these tables. The basic data tables give these other PeopleSoft products an efficient and quick way to obtain the information that they need for their business requirements.

During installation, the basic data tables are automatically synchronized with the information that is in the BORM. After that, the system keeps the BORM tables and the basic data tables in sync.

This diagram illustrates the relationship between CRM basic data tables and the BORM:



When you create a business object and save it in the BORM, a subset of this information is passed to the basic data tables.

PeopleSoft Online Marketing retrieves information directly from the basic data tables and updates information on the basic data tables by using XML messages. This information is also passed to the BORM tables, which keeps the BORM tables and the basic data tables in sync.

The external data import process also updates the basic data tables if audience information is attached to the import template.

Related Links

[Understanding the Data Import Application Engine Process \(RBIMPORT\)](#)

PeopleSoft Online Marketing

Business Object Profiles

Profile fields provide a configurable way for marketers to define and collect customer information, such as color preference, brand preference, or shipping preference, through online marketing. Profile data is defined and stored separately from the BORM but is related to a business object by its BO_ID key.

Customer Relationship Management components enable you to view and update business object profiles for a business object. You can also use profile fields as business object search criteria.

Related Links

[Understanding Profiles](#)

Defining Control Values for Business Objects

Understanding Business Object Controls

Business object control values are options that users can select when defining business objects. For many of these controls, the PeopleSoft Customer Relationship Management (PeopleSoft CRM) system provides system data to support specific processing.

These topics discuss:

- Business object types.
- Role types and role categories.
- Relationship types and relationship categories.
- Contact information entries.
- Contact method types and contact method purpose types.
- Component transfer navigation.

Business Object Types

The term *business object* refers to any entity that can participate in business relationships. Business objects participate in relationships with other business objects according to their assigned roles. Business object types categorize business objects and enable you to define roles for each type.

The PeopleSoft system delivers these predefined business object types:

- Individual
Represents a single individual, such as a contact or a consumer.
- Organization
Represents a group of individuals, such as a company.
- Database Object
Represents an object in the system.

See [Business Object Type Page](#).

Role Types and Role Categories

Business objects participate in relationships according to their assigned roles, or role types. Each business object type has a set of role types to which it is associated.

Individual Role Types

PeopleSoft CRM delivers these role types for individual business objects:

- **Person**

This role indicates a person with an undefined role. This role is automatically assigned when you create consumers, contacts, and workers by using the Person component.

- **Worker**

This role indicates a person who performs work for your company, either as an employee or as a contractor. This role is automatically assigned when you define a worker by using the Worker component.

- **Broker**

This role indicates a person who acts on behalf of multiple customers. You manually assign this role to a contact business object by using the Role page of the ad hoc Business Object component.

- **Contact**

This role indicates a person who acts on behalf of a customer. This role is automatically assigned when you designate that a person is a contact of a customer.

- **Individual Consumer**

This role indicates a person who purchases, leases, or contracts for your products or services. This role is automatically assigned when you define a consumer by using the Person (Individual Consumer) component.

- **Account Contact**

This role indicates a person who participates as a member of an account team that is assigned to manage a corporate account. This role is automatically assigned when you define a worker as a member of an account team on the Accounts page of the Company, Site, or Person (Individual Consumer) components.

- **Internal Contact**

This role is used for converting earlier versions of PeopleSoft CRM. Previously, PeopleSoft CRM used contact types; these are now role types.

- **External Contact**

This role is used for converting earlier versions of PeopleSoft CRM. Previously, PeopleSoft CRM used contact types; these are now role types.

- **Business Contact (IND)**

This role indicates that the individual is a customer.

- Ship To Individual

This role indicates that the individual is a customer who can receive shipments. This role is for order processing.

- Sold To Individual

This role indicates that the individual is a customer who can make purchases. This role is for order processing.

- Bill To Individual

This role indicates that the individual is a customer who can receive bills. This role is for order processing.

- Individual Prospect

This role indicates an individual prospect. This role is for sales.

- Sales User

This role type is assigned to sales users.

See “Setting Up Sales Users” (PeopleSoft Sales).

Organization Role Types

PeopleSoft CRM delivers these role types for organization business objects:

- Company

This role indicates an organization that purchases, leases, or contracts for your products or services. The system automatically assigns this role when you define a customer by using the Company component.

- Site

This role indicates a place where a product is shipped or installed, or where a service is performed. The system automatically assigns this role when you define a site by using the Company, Person (Individual Consumer), or Site component.

- Competitor

This role indicates a company that competes for your company's customer base. You can manually assign this role to company business objects by using the Role page of the ad hoc Business Object component.

- Primary Owner - Company

This role indicates a company that is the primary owner. This role is used in PeopleSoft Sales.

- Corporate Hierarchy

This role indicates an entity that makes up an organization structure, such as position, department, location, and division.

- Business Contact (ORG)

This role indicates that the organization is a customer.

- Ship To Organization

This role indicates that the customer can receive shipments.

- Sold To Organization

This role indicates that the customer can make purchases.

- Bill To Organization

This role indicates that the customer can receive bills.

- Organizational Prospect

This role indicates that the individual is an organizational prospect.

Depending on which PeopleSoft CRM solutions you have implemented, you might see additional role types listed on the system setup pages for roles. Additionally, you can view the organization of role types into role categories that support processing that applies to a specific set of role types.

Related Links

[Defining Role Types and Role Categories](#)

Relationship Types and Relationship Categories

Relationship types describe the relationship between two business objects. You must define a relationship type for each relationship in which a business object with a specific role can participate. The predefined business object relationship types are:

- Company ↔ Site

This type indicates a nonhierarchical relationship between the company and site role types and signals that a company includes a site. The system automatically establishes this relationship when you associate a site with a company by using the Company or Site component.

- Site ↔ Site

This type indicates a peer-to-peer relationship between two site role types and signals that the sites are associated with the same company. You create this relationship manually by using the Relationship page of the ad hoc Business Object component.

- Primary Contact ↔ Company

This type indicates a relationship between the contact and company role types and signals that the person with the contact role is the primary contact for the company. The system automatically establishes this relationship when you indicate the primary contact for a company by using the Company component.

- Contact ↔ Company

This type indicates a relationship between the contact and company role types and signals that the person with the contact role is a contact for the company. The system automatically establishes this

relationship when you associate a contact with a company by using the Company or Site components or the Person component with the Contact role.

- Primary Contact ↔ Site

This type indicates a relationship between the contact and site role types and signals that the person with the contact role is the primary contact for the site. The system automatically establishes this relationship when you indicate the primary contact for a company by using the Site component.

- Contact ↔ Site

This type indicates a relationship between the contact and site role types and signals that the person with the contact role is a contact for the site. The system automatically establishes this relationship when you associate a contact with a site by using the Company or Site components or the Person component with the Contact role.

- Primary Contact ↔ Consumer

This type indicates a relationship between the contact and consumer role types and signals that person with the contact role is the primary contact for the consumer. The system automatically establishes the relationship when you indicate the primary contact for a consumer by using the Person component with the Consumer role.

- Contact ↔ Consumer

This type indicates a relationship between the contact and consumer role types and signals that the person with the contact role is a contact for the consumer. The system automatically establishes the relationship when you associate a contact with a consumer by using the Site component or the Person component with the Consumer or Contact role.

- Primary Contact ↔ Person

This type indicates a relationship between contact and person role types and signals that the person with the contact role is the primary contact for the person with the person role. You manually create this relationship using the Relationship page of the ad hoc Business Object component.

- Contact ↔ Person

This type indicates a relationship between the contact and person role types and signals that person with the contact role is a contact for the person with the person role. You manually create this relationship by using the Relationship page of the ad hoc Business Object component.

- Consumer ↔ Site

This type indicates a nonhierarchical relationship between the consumer and site role types and signals that a consumer is associated with a site. The system automatically establishes the relationship when you associate a site with a consumer by using the Site component or the Person (Individual Consumer) component.

- Parent Company ↔ Company

This type indicates a hierarchical relationship between two company role types and signals that one company is the parent of another company. The system automatically establishes the relationship when you define a parent company on the Company component.

- Primary Contact ↔ Competitor

This type indicates a relationship between the contact and competitor role types and signals that the person with the contact role is the primary contact for a competitor. You manually create this relationship using the Relationship page of the ad hoc Business Object component.

- Contact ↔ Competitor

This type indicates a relationship between the contact and competitor role types and signals that the person with the contact role is a contact for a competitor. You manually create this relationship using the Relationship page of the ad hoc Business Object component.

- Acct Owner ↔ Company

This type indicates a relationship between account contact and company role types and signals that the person with the account contact role is the owner of the company account. The system automatically establishes the relationship when you indicate the owner on the Account page of the Company component.

- Acct Team Member ↔ Company

This type indicates a relationship between the account contact and company role types and signals that the person with the account contact role is a member of the company account team. The system automatically establishes the relationship when you add an account member on the Account page of the Company component.

Depending on which CRM solutions you have implemented, you might see additional relationship types listed on the system setup pages for roles. Additionally, you can view the organization of relationship types into relationship categories that support processing that applies to a specific set of relationship types.

Related Links

[Defining Relationship Types and Relationship Categories](#)

Contact Information Entries

The address book for a customer or contact contains multiple contact information entries. Address book entries combine multiple contact methods for a business object into one entry for easy accessing and updating.

As delivered, the Individual business object type has three default contact information entries with the descriptions *Business*, *Home*, and *All Others*. The organization business object type has two default contact information entries with the descriptions *Business* and *Home*. Users can change the entry description when they enter contact information.

You can create different types of address books to reflect the different purposes for which you might contact a business object.

Related Links

[Contact Information for Business Objects](#)

[Contact Info Page](#)

Contact Method Types and Contact Method Purpose Types

In PeopleSoft CRM, you can define multiple, effective-dated communication channels for company, site, consumer, contact, and worker business objects. For contact business objects, you can also define multiple communication channels for each of the roles that the contact plays in relationships with company, consumer, and site business objects.

Contact Method Types

A *contact method* is a specific communication channel. When you define a contact method for a business object or business object in a specific relationship role, you define the contact method *type* and purpose. The contact method type indicates the kind of communication channel, such as telephone or email.

PeopleSoft CRM provides these predefined contact method types:

- Address
- Phone
- Email

Contact Method Purpose Types

The *contact method purpose* indicates when the contact method is used. For example, a contact method purpose of *Main* might indicate the address to use for sending mail to a company's main offices. Similarly, a contact purpose type of *Home* might indicate the phone number to use when calling a consumer in the evening. You can define a set of contact method purpose types for each contact method in the system.

These predefined contact method purpose types are available for the address contact method type:

- Physical Location
- Business
- Campus
- Dormitory
- Home
- Legal
- Mailing
- Other

These contact method purpose types are available for the phone contact method type:

- Business
- Cellular
- Default
- FAX

- Home
- Telex
- Pager
- Campus
- Dormitory
- Main
- Other
- Home Fax
- Other Fax
- Assistant
- Callback
- Car
- SDN
- Radio
- TTY/TDD
- Company

These contact method purpose types are available for the email contact method type:

- Business
- Campus
- Dorm
- Home
- Other

Related Links

[Setting Up Contact Methods](#)

Component Transfer Navigation

A *component navigation definition* defines a specific transaction page in the system that users can transfer to from the Relationship Viewer component or the Relationship page of the Company, Person (Individual Consumer), Person (Business Contact), and Site components. If the business object is editable, a transfer button appears next to each business object that appears in the relationship viewer. If the business object is read-only, a link to the business object appears. The location that you access is determined by a component navigation definition.

The CRM system delivers predefined component navigation definitions for these CDM components:

Note: The text in parentheses indicates the component navigation transaction ID.

| Component Navigation Definition | Description |
|----------------------------------------|----------------------------------------------------------------------------------------|
| Account Representative (ACCTREP) | Enables transfers to the Accounts page of the Company component. |
| Business Contact (BC) | Not implemented for this release. |
| Business Object (BO) | Enables transfers to the Business Object page of the ad hoc Business Object component. |
| Company (COMPANY) | Enables transfers to the Company page of the Company component. |
| Individual Consumer (CONSUMER) | Enables transfers to the Consumer page of the Person (Individual Consumer) component. |
| Person (PERSON) | Enables transfers to the Contact page of the Person (Business Contact) component. |
| Site (SITE) | Enables transfers to the Site page of the Site component. |
| Worker (WORKER) | Enables transfers to the Worker page of the Worker component. |

Warning! Do not change component navigation definitions that are delivered for CDM components; any modification to the default settings can cause the application to behave improperly.

Defining Business Object and Name Types

To define business object and name types, use the Business Object Type (BO_TYPE) and Business Object Name Type (BO_NAME_TYPE) components.

These topics discuss how to:

- Modify and add business object types.
- Define name types for business objects.

Pages Used to Define Business Object and Name Types

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---------------------------------------|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Business Object Type Page</u> | BO_TYPE | Modify and add business object types. |
| <u>Business Object Name Type Page</u> | BO_NAME_TYPE | Define name types for the selected business object type. When you define names for a business object, you must specify a type for each name. |

Business Object Type Page

Use the Business Object Type page (BO_TYPE) to modify and add business object types.

Navigation:

Set Up CRM > Common Definitions > Customer > Business Object Type > Business Object Type

This example illustrates the fields and controls on the Business Object Type page. You can find definitions for the fields and controls later on this page.

Business Object Type

Description

Business Object Type ID 2
Description Organization
Short Description Org.

Modify System Data

This object is maintained by PeopleSoft.

Modified 10/22/2001 2:45PM PDT CVP1

When you open a business object type record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the **Modify System Data** button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Business Object Type ID | Displays the identification code that is associated with the business object type. When you add a new business object type, the system automatically assigns a value by using automatic numbering functionality. |

Note: You should seldom need to add additional business object types. Most entities that participate in relationships are adequately categorized by the delivered types.

Business Object Name Type Page

Use the Business Object Name Type page (BO_NAME_TYPE) to define name types for the selected business object type.

When you define names for a business object, you must specify a type for each name.

Navigation:

Set Up CRM > Common Definitions > Customer > Business Object Name Type > Business Object Name Type

This example illustrates the fields and controls on the Business Object Name Type page. You can find definitions for the fields and controls later on this page.

Business Object Name Type

Description

Business Object Type ID 2

Business Object Name Type PREFERRED

Description Preferred Name

Short Description Preferred

Modify System Data

This object is maintained by PeopleSoft.

Modified 10/10/2001 2:12PM PDT CVP1

In PeopleSoft CRM, each business object can have multiple names. The business object name type classifies each associated name for informational purposes. A name type is required for each business object name record. A *Preferred* name must exist for a business object before you can use the business object in a transaction.

| Field or Control | Description |
|---------------------------|-------------------------------------------------------------------------------------------------------------|
| Business Object Name Type | Enter the name type. The delivered name types are <i>Preferred</i> , <i>Alternate</i> , and <i>Merged</i> . |

Related Links

[Understanding Name and Address Information in CRM](#)

Defining Role Types and Role Categories

To define business object role types, use the Role Type (BO_ROLE_TYPE) component.

These topics discuss how to:

- Modify and add role types.
- Modify and adding role categories.

Pages Used to Define Role Types and Categories

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---------------------------|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Role Type Page</u> | BO_ROLE_TYPE | Modify and add role types. |
| <u>Role Category Page</u> | BO_SRCH_GROUP | Modify and add role categories. Generally, role categories serve a specific processing purpose, such as a business object directory search process. |

Role Type Page

Use the Role Type page (BO_ROLE_TYPE) to modify and add role types.

Navigation:

Set Up CRM > Common Definitions > Customer > Customer Role Type > Customer Role Type

This example illustrates the fields and controls on the Role Type page. You can find definitions for the fields and controls later on this page.

Role Type

Default Views

Role Type

Role Type Definition

Role Type ID

2

Description

Company

Short Description

Company

Business Object Type

Organization

Transaction ID

Company

Enabled Role Icon

PS_COMPANY_ICN

Disabled Role Icon

Cascade Option

Do not cascade

☒ Publish EIP

☒ Join Indicator

☒ Participant Indicator

☒ Capture Contact Methods

☒ Enabled for Basic Data

☒ Enabled for Quick Create

☒ SetID is Required

Application Class ID

Company

Package Tree Viewer

Application Class Path

RB_CDM:ORGANIZATION:COMPANY

Secure Record Name

BC



Status Record Name



BC

Status Field Name

CUST_STATUS

Roles

Personalize | Find |  

First  1-2 of 2  Last

| Role | Quick Create Template |
|-----------|----------------------------|
| 1 Site | The Company with Site (BC) |
| 2 Contact | CDM Company with Contact |

When you open a role type that is delivered as system data, the role type information appears in display-only format. To update the role type, click the **Modify System Data** button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

| Field or Control | Description |
|------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Role Type ID | Displays the identification code that is associated with the business object role type. When you add a new role type, the system automatically assigns a value by using automatic numbering functionality. |
| Transaction ID | Select the component transfer navigation definition that is associated with the role type. |
| Enabled Role Icon and Disabled Role Icon | Select an image to visually indicate the role status in various parts of the PeopleSoft CRM system, such as in the Relationship Viewer and Customer Data Management components. |
| Cascade Option | <p>Select <i>Cascade</i> to automatically update addresses for all related business objects whenever you update an address for a business object. For example, when a company changes its address, the system automatically updates the addresses for all company contacts that have the same address.</p> <hr/> <p>Warning! Selecting this option triggers multiple database operations when you update contact methods, which can severely degrade system performance. Oracle recommends that you enable this option only before a primary address change and disable it immediately afterward.</p> <hr/> |
| Publish EIP (publish enterprise integration points) | Select to include the role data when publishing a Customer Data Management (CDM) application message. If a business object has several roles, you can use this option to limit the roles for which data is published. |
| Join Indicator | Select to indicate a role that is assigned to business objects and exists primarily for group participant business objects. For example, you might create a household business object to group the people who live at a specific address. |
| Participant Indicator | Select to indicate a role that is assigned to business objects that participate in relationships with a business object that has a joining role. For example, you might create a household member role to assign to the people who live at a specific address. |
| Capture Contact Methods | Select to indicate that you want to capture contact methods for this role type. |

| Field or Control | Description |
|--------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Enabled for Basic Data | <p>Select to automatically run the PeopleTools BO_BAS_LOAD Application Engine process to update the basic data tables (BO_BASIC_ORG and BO_BASIC_IND) whenever you update data that pertains to this role. Basic data integrates with PeopleSoft Marketing and PeopleSoft Online Marketing.</p> <p>If you do not select this option, you must run the application engine process manually.</p> <p>See Basic Data Tables.</p> |
| Enabled for Quick Create | Select to enable the quick create function to use this role. |
| SetID is Required | <p>Select to require the entry of a setID when creating a business object with this role by using the quick create function.</p> <p>See Understanding the Business Object Search and Quick Create Process.</p> |
| Application Class ID and Application Class Path | Select the ID and path for the application class that encapsulates the business logic of the role that is denoted by this role type. For example, the contact role is supported by the contact application class. |
| Package Tree Viewer | <p>Click to view the available application classes that are provided by PeopleSoft CRM. When you click this link, the Application Packages Lookup page appears.</p> <p>See “Understanding Application Classes and Packages” (Automation and Configuration Tools).</p> |
| Secure Record Name | Enter a record name to enable setID security searching. |
| Status Record | Enter the name of the record that contains the role status to enable business object searching by status. |
| Status Field Name | Enter the name of the field that contains the role status to enable business object searching by status. |

Related Links

[Defining Component Transfer Navigation](#)

[Understanding BO Search and Quick Create Setup](#)

[Understanding the Business Object Search and Quick Create Process](#)

Role Category Page

Use the Role Category page (BO_SRCH_GROUP) to modify and add role categories.

Generally, role categories serve a specific processing purpose, such as a business object directory search process.

Navigation:

Set Up CRM > Common Definitions > Customer > Customer Role Category > Customer Role Category

This example illustrates the fields and controls on the Role Category page. You can find definitions for the fields and controls later on this page.

| Role Category | |
|-----------------------------------------------------------------------------------------------------|---------------------|
| Description | |
| Role Category ID | 2 |
| Description | Customer |
| Short Description | Customer |
| Category Roles Personalize View All [Icon] First 1-2 of 2 Last | |
| Role Type ID | Description |
| 2 | Company |
| 9 | Individual Consumer |

When you open a role category record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the **Modify System Data** button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

| Field or Control | Description |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Role Category ID | Displays the identification code that is associated with the business object role category. When you add a new role category, the system automatically assigns a value by using automatic numbering functionality. |

Defining Relationship Types and Relationship Categories

To define relationship types and relationship categories, use the Relationship Type (BO_REL_TYPE) and Relationship Category (BO_REL_CATEGORY) components.

These topics discuss how to:

- Modify and add relationship types.
- Define relationship categories.

Pages Used to Define Relationship Types and Relationship Categories

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-----------------------------------|------------------------|-------------------------------------|
| <u>Relationship Type Page</u> | BO_REL_TYPE | Modify and add relationship types. |
| <u>Relationship Category Page</u> | BO_REL_CATEGORY | Define categories of relationships. |

Relationship Type Page

Use the Relationship Type page (BO_REL_TYPE) to modify and add relationship types.

Navigation:

Set Up CRM > Common Definitions > Customer > Relationship Type > Relationship Type

This example illustrates the fields and controls on the Relationship Type page. You can find definitions for the fields and controls later on this page.

Relationship Type

Relationship Type Information

Relationship Type ID 10

Description Contact / Company

Short Description 10

Enabled Icon

Disabled Icon

☐ Primary Relationship
☐ Hierarchical
☒ Publish EIP
☒ Peer to Peer

Relationship Structure

Position 1

Role Type ID 1 (8) - Contact

Role Verb 1 Represents

Role Cardinality Many ☒ Role Optionality

Minimum 0

Maximum ☒ Unlimited

☒ Capture Contact Methods
☒ Enabled for Basic Data

Position 2

Role Type ID 2 (2) - Company

Role Verb 2 Is Represented By

Role Cardinality Many ☐ Role Optionality

Minimum 0

Maximum ☒ Unlimited

☐ Capture Contact Methods
☐ Enabled for Basic Data

When you open a relationship type record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the **Modify System Data** button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

| Field or Control | Description |
|------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Relationship Type ID | Displays the identification code that is associated with the relationship type. |
| Primary Relationship | Indicates that the relationship is coupled with another relationship type. Only one primary relationship can exist at one time; all others are secondary, with different relationship types. When you select Primary Relationship , another field appears where you can enter the secondary relationship type. |
| Hierarchical | Select to define a hierarchical relationship. Relationship hierarchies show parent-child relationships between business objects and are graphically represented with a tree format in the relationship viewer. In hierarchical relationships, the business object participating in the Role Type ID 1 field is interpreted as the parent, and the business object in Role Type ID 2 is the child. |
| Peer to Peer | Select to define a peer-to-peer relationship. Peer-to-peer relationships are appropriate between two business objects with a type of <i>Individual</i> that share a direct relationship to a third business object. |
| Publish EIP (publish enterprise integration points) | Select to include the relationship data when publishing a CDM application message. |

Relationship Structure

A relationship occurs between two business objects, each of which plays a specific role in the relationship. The relationship structure defines the two role types that define the relationship type, together with cardinality information, such as the number of business objects that can participate in a specified role for the relationship type.

| Field or Control | Description |
|------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| Role Type ID 1 and Role Type ID 2 | Select the role types that can participate in the relationship. Role types are established on the Role Type page. |
| Role Verb 1 and Role Verb 2 | Enter a verb clause that describes the role played by business objects that participate in the relationships of this type. |

| Field or Control | Description |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Role Cardinality | Select the number of business objects that can participate in the relationship role: <i>One</i> or <i>Many</i> . If the value is <i>One</i> for role type 1 or 2, only one business object is defined in the specified role for a given instance of the relationship. If the value is <i>Many</i> , you can define minimum and maximum values for the number of business objects that are defined in the specified role. |
| Role Optionality | Select if this type of relationship is required when you add a role. |
| Minimum and Maximum | Enter the minimum and maximum values for the number of objects that can participate in this relationship. If no maximum constraint exists, select the Unlimited check box. |
| Capture Contact Methods | Select the parties in the relationship for which you want to capture contact methods. For example, when capturing the contact methods for a contact in a relationship with a company, you do not specify a relationship contact method for the company, but you do specify a relationship contact method for the contact. |
| Enabled for Basic Data | PeopleSoft CRM uses this field in system data to determine whether a summarization of information (basic data) is stored for the relationship. Basic data integrates with PeopleSoft Marketing and PeopleSoft Online Marketing. |

Note: To use the relationship viewer with a specific role type, configure the role in a relationship by using the Configure Relationship Views component, which you access by selecting **Set Up CRM > Common Definitions > Customer**.

Related Links

[Understanding the Relationship Viewer](#)

Relationship Category Page

Use the Relationship Category page (BO_REL_CATEGORY) to define categories of relationships.

Navigation:

Set Up CRM > Common Definitions > Customer > Relationship Category > Relationship Category

This example illustrates the fields and controls on the Relationship Category page. You can find definitions for the fields and controls later on this page.

Relationship Category

Description

Relationship Category ID 11
Description Primary Ship To Contact
Short Description PSH2Contct

Relationships in Category

Personalize | Find | View All |

First 1-2 of 2
 Last

| Relationship Type ID | Bus Object Relationship Name | Role Type 1 Name | Role Type 2 Name |
|----------------------|--------------------------------|------------------|----------------------|
| 73 | Primary Contact for BC Org Sh2 | Contact | Ship To Organization |
| 79 | Primary Contact for BC Ind Sh2 | Contact | Ship To Individual |

When you open a relationship category record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the **Modify System Data** button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

| Field or Control | Description |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Relationship Category ID | Displays the identification code that is associated with the relationship category. When you add a new relationship category, the system automatically assigns a value by using automatic numbering functionality. |

Configuring Address Books

This topic discusses how to define contact information entries.

Page Used to Configure Address Books

| Page Name | Definition Name | Usage |
|-------------------------------------------------|-----------------|----------------------------------------------------------------|
| Address Book Configuration Page | BO_TYPE_ABE | Define contact information entries for a business object type. |

Address Book Configuration Page

Use the Address Book Configuration page (BO_TYPE_ABE) to define contact information entries for a business object type.

Navigation:

Set Up CRM > Common Definitions > Customer > Address Book Configuration > Address Book Configuration

This example illustrates the fields and controls on the Address Book Configuration page. You can find definitions for the fields and controls later on this page.

Address Book Configuration

Description

Business Object Type ID 2

Description Organization

Short Description Org.

Contact Info Configuration

| Seq | Description | Address | Phone 1 | Phone 2 | Phone 3 | Phone 4 | Email 1 | Email 2 |
|-----|---------------------------------------|-----------------------------------------|-----------------------------------------|-----------------------------------------|------------------------------------|--------------------------------------|----------------------------------------|--------------------------------------|
| 1 | <input type="text" value="Business"/> | <input type="text" value="Business"/> ▼ | <input type="text" value="Business"/> ▼ | <input type="text" value="Cellular"/> ▼ | <input type="text" value="FAX"/> ▼ | <input type="text" value="Pager"/> ▼ | <input type="text" value="Busine:"/> ▼ | <input type="text" value="Other"/> ▼ |
| | <input type="text" value="Entry"/> | <input type="text" value="Other"/> ▼ | <input type="text" value="Main"/> ▼ | <input type="text" value="Cellular"/> ▼ | <input type="text" value="FAX"/> ▼ | <input type="text" value="Pager"/> ▼ | <input type="text" value="Other"/> ▼ | <input type="text" value="Other"/> ▼ |

Contact Info Configuration

| Field or Control | Description |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Description | Enter a description to uniquely identify a contact information entry for the business object type. The contact method types that you select become the default labels on the Contact Info (contact information) page. You can change these labels when you enter information for this contact method information. |

Related Links

- [Address Books in CRM](#)
- [Contact Information on CRM Components](#)

Setting Up Contact Methods

To set up contact methods, use the Contact Method Type (CM_TYPE), Contact Method Purpose Type (CM_PURPOSE_TYPE), and Contact Method Use (CM_USE) components.

These topics discuss how to:

- Maintain contact method uses.
- Modify contact method types.
- Maintain or add contact method purpose types.

Pages Used to Set Up Contact Methods

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-----------------------------------------|-------------------------------|-----------------------------------------------|
| <u>Contact Method Use Page</u> | CM_USE | Maintain contact method uses. |
| <u>Contact Method Type Page</u> | CM_TYPE | Maintain contact method types. |
| <u>Contact Method Purpose Type Page</u> | CM_PURPOSE_TYPE | Maintain or add contact method purpose types. |

Contact Method Use Page

Use the Contact Method Use page (CM_USE) to maintain contact method uses.

Navigation:

Set Up CRM > Common Definitions > Customer > Contact Method Use > Contact Method Use

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Description | Enter a description for the contact method use. |
| Use Icon | Select the icon that you want to associate with this contact method use. After you select the icon, the actual icon appears to the right of the field. |

Contact Method Type Page

Use the Contact Method Type page (CM_TYPE) to maintain contact method types.

Navigation:


Set Up CRM > Common Definitions > Customer > Contact Method Type > Contact Method Type

This example illustrates the fields and controls on the Contact Method Type page (1 of 2). You can find definitions for the fields and controls later on this page.


Contact Method Type










Contact Method Type

Contact Method Type ID 2
Description Phone Contact Method
Short Description Phone
Capture for Quick Create Many




Uses
[Personalize](#) | [View All](#) | 
First 1 of 1 Last

| Priority | Contact Method Use ID |
|----------|-----------------------|
| | |

Roles
[Personalize](#) | [View All](#) | 
First 1-9 of 9 Last

| Priority | Role Type ID | |
|----------|---------------------|---------------------------------------------------------------------------------------|
| 16 | Company |  |
| 1 | Site |  |
| 6 | Worker |  |
| 7 | Contact |  |
| 3 | Individual Consumer |  |
| 17 | Partner |  |
| 5 | Partnership |  |
| 4 | Alternate Capacity |  |
| 8 | Person of Interest |  |

This example illustrates the fields and controls on the Contact Method Type page (2 of 2). You can find definitions for the fields and controls later on this page.

| Relationships | | Personalize View All  | First  1-10 of 12  Last |
|---------------|-------------------------------|--------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Priority | Relationship Type ID | | |
| 3 | Primary Contact / Company | | |
| 6 | Contact / Company | | |
| 5 | Primary Contact / Site | | |
| 7 | Contact / Site | | |
| 4 | Primary Contact / Consumer | | |
| 8 | Contact / Consumer | | |
| 1 | Primary Contact / Partner | | |
| 11 | Contact / Partner | | |
| 10 | Contact / Partnership | | |
| 4 | Primary Contact / Partnership | | |

| Person Basic Sync Setting | |
|---------------------------|-------------------------------------|
| Role Type ID | Add Contact Methods |
| Worker | <input checked="" type="checkbox"/> |
| Individual Consumer | <input checked="" type="checkbox"/> |
| Person of Interest | <input type="checkbox"/> |

When you open a business object contact method type record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the **Modify System Data** button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

Contact Method Type

Information about the contact method type appears in this page region.

| <i>Field or Control</i> | <i>Description</i> |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Contact Method Type ID | Displays the identification code that is associated with the contact method type. When you add a new contact method type, the system assigns a value by using automatic numbering functionality. |

Uses

If you define contact method uses, you can associate uses with the contact method here.

| Field or Control | Description |
|------------------------------|-----------------------------------------------------------------------------------------|
| Contact Method Use ID | Select the contact method uses that you want to associate with the contact method type. |

Roles

Displays the roles that are associated with a contact method and enables you to add new roles or modify existing ones.

| Field or Control | Description |
|-------------------------|---------------------------------------------------------------------------|
| Priority | Enter a priority for listing the role on the contact method detail pages. |

Relationships

Displays the relationships that are associated with a contact method and enables you to add new relationships or modify existing ones.

| Field or Control | Description |
|-------------------------|-----------------------------------------------------------------------------------|
| Priority | Enter a priority for listing the relationship on the contact method detail pages. |

Person Basic Sync Setting

Displays the roles for which new contact method entries of this contact method type will be created for a customer when new contact data is received through the Person Basic Sync EIP. Supported roles are *Individual Consumer*, *Worker*, and *Person of Interest*.

| Field or Control | Description |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add Contact Methods | Select roles for which new entries of this type will be created via EIP. Selecting this check box indicates Person Basic Sync will create new contact methods of this type for the designated role if the role exists for the person. |

Related Links

[Integration with PeopleSoft HCM, PeopleSoft Campus Solutions or Third-Party HR Data](#)

Contact Method Purpose Type Page

Use the Contact Method Purpose Type page (CM_PURPOSE_TYPE) to maintain or add contact method purpose types.

Navigation:

Set Up CRM > Common Definitions > Customer > Contact Method Purpose Type > Contact Method Purpose Type

This example illustrates the fields and controls on the Contact Method Purpose Type page. You can find definitions for the fields and controls later on this page.

The screenshot shows a web page titled "Contact Method Purpose Type". Below the title is a table with the following data:

| Description | |
|---------------------------|----------|
| Contact Method Type ID | 2 Phone |
| Contact Method Purpose ID | 11 |
| Description | Business |
| Short Description | Business |
| Field Value | BUSN |

When you open a contact method purpose type that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the **Modify System Data** button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

| <i>Field or Control</i> | <i>Description</i> |
|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Contact Method Type ID | Displays the contact method type with which the contact method purpose is associated. |
| Contact Method Purpose ID | Displays the identification code that is associated with the contact method purpose type. When you add a contact method purpose type, the system assigns a value by using automatic numbering functionality. |
| Field Value | Enter a value to map contact method purpose types in PeopleSoft CRM to corresponding translate values in PeopleSoft Supply Chain Management and third-party systems. |

Defining Component Transfer Navigation

To define component transfer navigation, use the Component Navigation (RB_TXN_DEFN) component.

This topic discusses how to define component transfer navigation paths.

Pages Used to Define Component Transfer Navigation

| Page Name | Definition Name | Usage |
|------------------------------------------------|------------------------|---------------------------------------------------------------------------------------------------------------------|
| <u>Component Navigation - Description Page</u> | RB_TXN_DEFN | Maintain component transfer navigation descriptions. |
| Component Navigation - Navigation Path | RB_TXN_MKT | Define component transfer navigation paths (the locations of the transaction pages to which users are transferred). |

Component Navigation - Description Page

Use the Component Navigation - Description page (RB_TXN_DEFN) to maintain component transfer navigation descriptions.

Navigation:

Set Up CRM > Common Definitions > Component Configuration > Component Navigation > Description

This example illustrates the fields and controls on the Component Navigation - Navigation Path page. You can find definitions for the fields and controls later on this page.

Description

Navigation Path

Description

Transaction ID

ADD_COMPANY

Description

Add Company

Component Transfer Details

Find | View All

First 1 of 1 Last

Market

Global

Transaction Title

Menu Name

RB_MANAGE_CUSTOMER_INFORMATION

Menu Bar Name

USE

Item Name

RD_COMPANY_2

Component Name

RD_COMPANY_2

Page Name

RD_COMPANY_SUMMARY

Record (Table) Name

RD_COMPANY

Description Fieldname

Component Interface Name

Display Template

Note: To enable component transfers, enter a value for each of the fields on this page.

| Field or Control | Description |
|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Market | Specify the name of the market with which the component is associated. A component is uniquely identified by its name and its market association. You can add records for each market. |
| Menu Name, Menu Bar Name, Item Name, Component Name, and Page Name | Enter the complete navigation for the page to which the users transfer. Enter the PeopleSoft PeopleTools object names for the menu, menu bar, item name, component name, and page name. |
| Record (Table) Name | Select the object name for the table that is populated by the specified page. Typically, this is the search record. |

Defining Segment Codes

To define segment codes, use the Segment Code (RD_SEGMENT) component.

This topic discusses how to define segment codes.

Page Used to Define Segment Codes

| Page Name | Definition Name | Usage |
|--------------------------|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Segment Code Page</u> | RD_SEGMENT | Define codes that represent customer attributes, such as a customer's market segment, priority, or value. For informational purposes, you can associate each company and consumer with a segment code. |

Segment Code Page

Use the Segment Code page (RD_SEGMENT) to define codes that represent customer attributes, such as a customer's market segment, priority, or value.

For informational purposes, you can associate each company and consumer with a segment code.

Navigation:

Set Up CRM > Common Definitions > Customer > Segment Code > Segment Code

Segment codes enable you to define customer attributes that are important for your business objectives. For example, you can use segment codes to define a customer's market segment, priority, or total value to

your enterprise. Segment codes are informational in PeopleSoft CRM. However, you can develop reports based on the segment codes that are associated with your customers.

Defining Industries

To define industries, use the Industry (RSF_INDUSTRY) component.

This topic discusses how to define industries.

Page Used to Define Industries

| Page Name | Definition Name | Usage |
|---------------|-----------------|--------------------|
| Industry Page | RSF_INDUSTRY | Define industries. |

Industry Page

Use the Industry page (RSF_INDUSTRY) to define industries.

Navigation:

Set Up CRM > Common Definitions > Customer > Industries > Industry

This example illustrates the fields and controls on the Industry page. You can find definitions for the fields and controls later on this page.

Industry

Industry ID

Industry ID

COMPUTER EQUIPMENT, RETAIL

*Description

Computer Equipment, Retail Hardware

SIC Code

3572

*Status

Active

Parent Industry ID

COMPUTERS, RETAIL

Modified

05/08/2001 1:16PM PDT

SAMPLE

| Field or Control | Description |
|----------------------------------------------------|----------------------------------------------------------------------|
| SIC Code (standard industrial classification code) | Enter the standard industrial classification code for this industry. |
| Parent Industry ID | Enter the parent industry for this industry. |

Related Links

[Understanding the Company Component](#)

Defining National ID Types

This topic discusses how to define national ID types.

Page Used to Define National ID Types

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---------------------------------------------------|------------------------|---------------------------|
| National Identification Type Page | NID_TYPE_TABLE | Define national ID types. |

National Identification Type Page

Use the National Identification Type page (NID_TYPE_TABLE) to define national ID types.

Navigation:

Set Up CRM > Common Definitions > Customer > National ID Type > National Identification Type

This example illustrates the fields and controls on the National Identification Type page. You can find definitions for the fields and controls later on this page.

| <i>Field or Control</i> | <i>Description</i> |
|------------------------------------------------|---------------------------------------|
| NID Type (national identification type) | Enter the type of national ID. |
| National ID Format | Enter the format for the national ID. |

Related Links

[Defining Information for Business Contacts](#)

Defining Customer Groups

To define customer groups, use the Customer Group Table (CUST_GROUP_TBL) component.

This topic discusses how to define customer groups.

Page Used to Define Customer Groups

| Page Name | Definition Name | Usage |
|-------------------------------------------|-----------------|-------------------------------------------------------------------------------------------------------|
| Customer Group Table Page | CUST_GROUP_TBL | Define customer groups. You can assign customers to groups for reporting and administration purposes. |

Customer Group Table Page

Use the Customer Group Table page (CUST_GROUP_TBL) to define customer groups.

You can assign customers to groups for reporting and administration purposes.

Navigation:

Set Up CRM > Common Definitions > Customer > Customer Group > Customer Group Table

This example illustrates the fields and controls on the Customer Group Table page. You can find definitions for the fields and controls later on this page.

Customer Group Table

SetID SHARE

Customer Group MERGE

Customer Group Description

Find | View All

First 1 of 1 Last

Customer Group Type Pricing

*Effective Date03/10/2021

*StatusActive

*DescriptionMerge Customer Group

*Short DescriptionMerge Cust

☐ Global

| Field or Control | Description |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Customer Group Type | Enter the type of customer group. Available group types include Accounting, Allocation Group, Buying Agreement, Direct Debit, Forecasting, Freight, Pricing Arbitration Plan, Reporting, Tax, and Transportation. |

Defining Customer Data Management System Options

To define customer data management system options, use the Customer Data Management System Options (BO_INSTALLATION) component.

This topic discusses how to define customer data management system options.

Page Used to Define Customer Data Management System Options

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-----------------------------------------------------|-------------------------------|-------------------------------------------------|
| <u>Customer Data Management System Options Page</u> | BO_INSTALLATION | Define customer data management system options. |

Customer Data Management System Options Page

Use the Customer Data Management System Options page (BO_INSTALLATION) to define customer data management system options.

Navigation:

Set Up CRM > Common Definitions > Customer > Customer Installation Options > Customer Data Management System Options

This example illustrates the fields and controls on the Customer Data Management System Options page. You can find definitions for the fields and controls later on this page.

Customer Data Management System Options

System Settings

☒ **Search for CM Before Adding**

This feature allows you to search for an existing contact method based on all the fields you provide for a new contact method. If an exact match is found, then instead of adding a new Contact Method, the existing one will be used as a reference.

☒ **Show Contact Method Search**

This feature allows the user of the Customer Data Management components to enter contact method information into the page and then search for matching contact methods. If this option is not selected, the Search button will not be shown on the Edit Contact Method pages.

☒ **Process Basic Data Summary**

This feature will update the basic data tables and override the setting for the role. The basic data tables are used by PeopleSoft CRM Online Marketing, the data import process, and PeopleSoft CRM Mobile. The checkbox must be selected when these products are installed.

☒ **Secure Quick Create Access**


This feature restricts access to the Quick Create functionality based on the user's security access to the Customer Data Model components, as defined by the user's Permission List.

☐ **Enable Bindz for Oracle**

This feature enables the BO Search SQL generation for the Oracle platform utilizing bind variables. If unchecked, search criteria value are embedded into the SQL string and bind variables are not used.

☐ **CRM Integrated With SCM**

Default SetID for Inbound EIPs



☐ **Enable Search Match for EIP**

This feature will enable the calling of the Search Match function when processing the Person Basic Sync incremental message. The Person Basic Fullsync message does not use Search Match because it is an initial load program.

Search Match Configuration ID

[View Details](#)


☐ **Use ABE Configuration for EIP**

This feature directs the Person Basic Sync and Fullsync EIPs to use the Address Book Configuration settings when assigning Contact Methods into Address Book Entry categories. Address Books are rebuilt for the Person each time Contact Methods are updated by EIP.

Integration for HR HelpDesk

CRM Integrated With HCM
☒ **EBS HCM**

Employee ID display options



Modified 07/09/2014 2:09AM PDT VP1

| Field or Control | Description |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Process Basic Data Summary | <p>Select to update basic data tables during data import. Selecting this option overrides the setting for the role. The basic data tables are used by PeopleSoft CRM Online Marketing and the data import process.</p> <p>Note: To improve system performance, clear this check box if you are not using any of these processes.</p> |

| Field or Control | Description |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CRM Integrated With SCM | Select if you will be integrating the PeopleSoft CRM application with PeopleSoft SCM using enterprise integration points. |
| Default SetID for Inbound EIPs (default setID for inbound enterprise integration points) setID default for data integration EIPs (enterprise integration points) default setID | Select the default setID. The CDM EIPs use this setID during the processing of the EIPs if no setID is provided on the incoming application messages. See Understanding Enterprise Integration Technology . |
| Enable Search Match for EIP | See “Using Search/Match with PERSON_BASIC_SYNC” (PeopleSoft CRM for Higher Education). |
| Search Match Configuration ID | See “Using Search/Match with PERSON_BASIC_SYNC” (PeopleSoft CRM for Higher Education). |

Integration for HR HelpDesk

| Field or Control | Description |
|------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CRM Integrated with HCM | Select the EBS HCM check box if the system is integrated with EBS HCM. |
| Employee ID display options | <p>Select a value from the list to set the field display options if the integration with EBS HCM is done for HR HelpDesk. The values available are:</p> <ul style="list-style-type: none"> Both: Displays both EBS Employee Number and PeopleSoft Employee ID in HR HelpDesk pages. Only EBS Employee No: Displays only EBS Employee Number in the HR HelpDesk pages. Only Peoplesoft Empl ID: Displays only PeopleSoft Employee ID in HR HelpDesk pages. <p>The following HR HelpDesk pages are affected by this setting.</p> <ul style="list-style-type: none"> Worker Case Details for HRHD case Related Cases for HRHD case Self Service HRHD Case creation for Direct Reports Chat Mini Navigation |

Defining Basic Data Mappings

These topics discuss how to:

- Map CDM properties to basic data tables.
- Clone basic data mappings.

Note: The Basic Data Mapping component is hidden as delivered. It is intended for consultants and internal developers, and is not officially supported by Oracle.

To expose the component on the left hand navigation, navigate to **PeopleTools > Portal > Structure and Content**. Click the **Set Up CRM** link. The page refreshes. Click the **Common Definitions** link. The page refreshes again. Click the **Customer** link. Click the **Edit** link for the Basic Data Mapping label at the bottom of the page. On the Content Ref Administration page that appears, clear the **Hide from portal navigation** check box. Click **Save**. Log out, close the browser, clear the browser cache, and log in again for the change to take effect.

Pages Used to Define Basic Data Mappings

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------------------------------|------------------------|------------------------------------------------------------------------|
| Basic Data Mapping Page | BO_ROLE_MAP | Map CDM role and relationship properties to basic data tables. |
| Basic Data Mapping Cloning Page | BO_ROLE_MAP_CLONE | Clone basic data mappings. |
| Basic Data Enabled Roles | BO_ROLE_MAP_ENABLE | View a summary list of the basic data mapping roles and relationships. |

Related Links

[Basic Data Tables](#)

Basic Data Mapping Page

Use the Basic Data Mapping page (BO_ROLE_MAP) to map CDM role and relationship properties to basic data tables.

Navigation:

Set Up CRM > Common Definitions > Customer > Basic Data Mapping > Basic Data Mapping

This example illustrates the fields and controls on the Basic Data Mapping page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Basic Data Mapping' page with the following details:

- Basic Data Mapping** (selected tab)
- Role Type ID**: Company
- Mapping Type**: Role Mapping
- Class Path**: RB_CDM:ORGANIZATION:COMPANY
- Class ID**: Company

Mapping Details section:

Find | View All | First 1 of 5 Last

Element Type: Field

Property <--> BD Field

| From Property | From Record | From Field | To Record | *To Field | |
|------------------|-------------|---------------|--------------|------------------|-----|
| BOID | | | BO_BASIC_ORG | BO_ID | + - |
| | | | BO_BASIC_ORG | ROLE_TYPE_ID | + - |
| | | | BO_BASIC_ORG | BO_REL_ID | + - |
| CompanySetID | RD_COMPANY | SETID | BO_BASIC_ORG | SETID | + - |
| DATA_SET_SYS_ID | BO_MKT_DATA | DATASET_SYSID | BO_BASIC_ORG | DATASET_SYSID | + - |
| CompanyID | RD_COMPANY | COMPANYID | BO_BASIC_ORG | COMPANYID | + - |
| CUST_ID | BC | CUST_ID | BO_BASIC_ORG | CUST_ID | + - |
| DUNS_NUMBER | BO_MKT_DATA | DUNS_NUMBER | BO_BASIC_ORG | DUNS_NUMBER | + - |
| EXTERNAL_LIST_ID | BO_MKT_DATA | EXTERNAL_LIST | BO_BASIC_ORG | EXTERNAL_LIST_ID | + - |
| WebUrl | RD_COMPANY | WEB_URL | BO_BASIC_ORG | WEB_URL | + - |

Use this page to map properties from CDM records and fields to basic data records and fields. You can map either by role or relationship.

Basic Data Mapping

Information about the roles and relationships you are mapping appears in this page region. This is system data that you cannot modify on this page.

Property Mapping Details

Specify the source record and field and the target record and field for each property that is mapped.

Basic Data Mapping Cloning Page

Use the Basic Data Mapping Cloning page (BO_ROLE_MAP_CLONE) to clone basic data mappings.

Navigation:

Set Up CRM > Common Definitions > Customer > Basic Data Mapping > Basic Data Mapping Cloning

This example illustrates the fields and controls on the Basic Data Mapping Cloning page. You can find definitions for the fields and controls later on this page.

Basic Data Mapping Basic Data Mapping Cloning Basic Data Enabled Roles

Clone Mapping

Give the keys to create a new mapping from this mapping:

*Role Type ID Company ▼

*Mapping Type Role Mapping ▼

Clone Mapping

Clone Mapping

Select a role type and a mapping type to clone the current mapping that appears on the Basic Data Mapping page to another role type. For a mapping type of *Relationship Mapping*, the **Relationship ID** field appears.

You cannot overwrite an existing mapping by cloning a new mapping to it. The role type and mapping type that you specify must not currently exist in the system.

Defining Name and Address Information for Business Objects

Understanding Name and Address Information in CRM

These topics list common elements and discuss:

- Business object names in CRM.
- Address books in CRM.
- Contact information on CRM components.
- Contact information for business object relationships.

Related Links

[Understanding the Company Component](#)

[Understanding Sites](#)

[Understanding Persons](#)

Common Elements Used to Define Basic Data Mappings

| <i>Field or Control</i> | <i>Description</i> |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Primary Name | The name that appears online when the business object is referenced in system transactions. |
| Contact Method Type | A method by which you contact a business object. CRM provides the <i>Address</i> , <i>Phone</i> , and <i>Email</i> contact methods with the system. |
| Contact Method Purpose Type | <p>A further clarification of a contact method. As delivered, the <i>Home</i> and <i>Business</i> contact method purpose types are available for the Email contact method and the types <i>Home</i>, <i>Business</i>, <i>Fax</i>, and <i>Pager</i> contact method purpose types are available for the Phone contact method. CRM provides additional contact method purpose types that you can configure and you can define additional types as needed.</p> <p>See Contact Method Types and Contact Method Purpose Types.</p> |

| Field or Control | Description |
|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Contact Info Entry (contact information entry) | A grouping of contact methods. As delivered, contact information entries in CRM can contain one address, up to two email addresses, and up to four phone numbers. See Configuring Address Books . |
| Address Book | The collection of contact info entries for a business object. |
| Consumer | A person business object that has the consumer role. |

Business Object Names in PeopleSoft CRM

When you initially create a new company, consumer, contact, site, or worker business object, you enter the business object name. This becomes the *preferred* name for the business object and appears on the Summary page of the component. You can add *alternate* names for the business object. To edit a name, add alternate names, or change the preferred name, access the More Names page from the Details page of the component.

Address Books in CRM

Contact information for business objects is logically grouped into *address books*, which function in the same way as a personal address book. For example, a person named Larry Hill might give you his home address, email, and telephone number. If you also need to get in touch with Larry during the daytime or send him business correspondence, he might also give you a work address, cell phone number, pager number, and work email. If Larry operates out of two offices, you keep an *address book entry* for each of Larry's offices as well as for his home address. You can maintain address books for business objects and for sites and contacts of business objects.

Contact information entries on a component appears on both the Summary page and on a separate, more detailed Contact Info page.

Note: If an individual business object or an organizational business object (Company) has multiple roles, then the contact information defaults to both roles. For example, if Larry Hill is both a contact and a consumer, a phone number for Larry Hill phone number applies to both roles by default. The exception is the worker role. Since there may be security issues around the worker role, information does not default to or from this role. So if Larry is both a worker and a consumer, and you add a phone in the Worker component, it will only apply to Larry in the role of worker, not consumer.

Contact Information on CRM Components

These topics discuss:

- Summary contact information.
- Detailed contact information.
- Advanced options.

- Existing address searches.
- Contact method definition for business object roles.
- Contact method definition for business object relationships.

See [Address Book Configuration Page](#).

Summary Contact Information

Contact information on the Summary page includes the address, two email address, and all four phone numbers. To view the complete contact information for a business object, you must use the Contact Info page that you can access either by clicking the **More Info** link on the Summary page or by selecting the Contact Info tab. By default, the first contact information entry in the address book appears for organization type business objects, and the first and second contact information entries appear for individual type business objects. You can specify the contact information entry that appears on the summary page by clicking the **Set Display** link.

Detailed Contact Information

The Contact Info page enables you to maintain the contact information for the business object and its associated sites and business contacts. You click the description for an entry to view and edit the entry's details or you can create a new entry. The advanced options on the Contact Info page enable you to manage contact methods independently of the contact information entry in which they are defined.

The Contact Info page enables you to view and update:

- Address information.

You can add, view, or update address book entries. or view and update additional address, email, and phone contact information for an entry that is in the address book or to access additional entries. This page is the primary place where you maintain contact information for a business object. You can enter or update details of the contact methods that are associated with the business object or click the trash can button to cause all of the contact methods that are within the contact information entry to expire on the current date.

- Contacts.

You can associate an existing business contact with a customer or create a new business contact to add to the customer. Contacts that are associated with customers can have address book entries and sites associated with them.

- Sites.

You can create and update sites for a customer or contact.

Advanced Options

The Advanced Options section on the Contact Info page contains three tabs: **Address**, **Email**, and **Phone**. Each tab lists the entries that are defined for that particular contact method type. The **Edit** button for each entry provides the only access to the Contact Method Details page, where you can update the start and end dates for the contact method or associate the contact method with roles independently of the other contact methods in a contact info entry.

Existing Address Searches

You can search for existing addresses when you add or update address information. This enables you to find and modify an address that is similar to an existing address for a company, site, or person.

To search for an existing address, use one of the following two methods:

1. Enter any known address information, click the **Look Up Address** link on the Contact Info page for a company, consumer, contact, site, or worker, and select an address from the list of existing addresses. The system uses the information you enter as search criteria and returns any contact method records that match the criteria. You can select the applicable record, or, if none of the returned records apply, create a new contact record.
2. Enter known address information on the Update Address page and search for an existing address.

Note: Depending on the volume of addresses that are in the system and the number of search criteria that is entered, the address search feature can slow system performance.

Contact Method Definition for Business Object Roles

The contact methods that you define at the business object level are automatically associated with the role that the system assigns to the business object. For example, when you establish a business object using the Company component, the system assigns the Company role to the business object and creates contact method records for the role by using the contact information that you define. When you define a site business object by using the Site component or the Sites page in any other component, the system assigns the site role to the business object and records the contact information that you define for the site at both the business object and role levels.

Contact Method Definition for Business Object Relationships

When you associate a contact or site with a customer, you can define separate contact methods that apply only to the relationship between a customer and its contacts or between a customer and its sites.

Address information for a new contact or site is usually similar to address information that was previously defined in the system. CRM provides you with the capability to search for address information that was previously defined when you add contacts or sites to a business object. For example, when you define a contact for a company, you can use an existing address with perhaps a modified mail stop number for the contact.

Updating Name Information

This topic discusses how to add and update names.

Pages Used to Update Name Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------|-------------------------------|-------------------------------|
| Company - Details | RD_COMPANY_DETAILS | Add or modify a company name. |

| Page Name | Definition Name | Usage |
|---------------------------------------------|------------------------|----------------------------------------------------------------------------|
| Person - Details | RD_PERSON_DETAILS | Add or modify a person's name. |
| Site - Name | RD_SITE_NAME_PG | Add or modify a site name. |
| Company - More Names Person - More Names | RD_MORE_NAMES_SEC | Add and update names and designate a primary name for a company or person. |

More Names Page

Use the More Names page (RD_MORE_NAMES_SEC) to add and update names and designate a primary name for a company or person.

Navigation:

Click the **More Names** link on the Details page for a company or person.

This example illustrates the fields and controls on the More Names page. You can find definitions for the fields and controls later on this page.

| Field or Control | Description |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Primary | Select to indicate a primary name for the company or site. When you initially create the component, the name that you enter on the Detail page is the default primary name record for the company or site business object. |
| Name Type | Select the type of name, <i>Preferred Name</i> , <i>Alternate Name.</i> , or <i>Merged</i> . |
| Add New Name | Click to enter an additional name. |

Related Links

[Defining Business Object and Name Types](#)

Managing Summary Contact Information

This topic lists the pages used to manage summary contact information.

Pages Used to Manage Summary Contact Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------|-------------------------------|-----------------------------------------------------------------------------------------------------------------|
| Company - Summary | RD_COMPANY_SUMMARY | View name and primary contact information for a company and the primary contact of the Company (if available). |
| Company - Details | RD_COMPANY_DETAILS | Maintain the first contact information entry for the company. |
| Site - Primary | RD_SITE_MAIN_2 | View the name and maintain the first contact information entry of a site or Alternate Capacity business object. |
| Person - Primary | RD_PRSN_PRIMARY | View the name and maintain the first and second contact information entries of a person or worker. |

Maintaining Contact Information for Business Objects

These topics discuss how to:

- Access contact information.
- Maintain contact information.
- Select existing addresses.
- Update address detail.
- Update phone detail.
- Update email detail.

Pages Used to Maintain Contact Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------|-------------------------------|--------------------------------------------------------------|
| Person - Contact Info | RD_PRSN_ADDR_BOOKS | Access contact information for a person, worker, or contact. |

| Page Name | Definition Name | Usage |
|------------------------------------------------------------------------------|------------------------|--------------------------------------------------------------------------------------------|
| Company - Contact Info | RD_COMP_ADDR_BOOK | Access contact information for a company. |
| Site - Contact Info | RD_SITE_ADDR_BOOK | Access contact information for a site. |
| Company - Address Book Person - Address Book Site - Address Book | ABE_DETAIL | Maintain contact information entries for a person, company, or site. |
| <u>Address Search Result List Page</u> | ABE_ADD_LOOKUP_SEC | Select an existing address to use or modify as the address for a company, person, or site. |
| Company - Update Address Person - Update Address Site - Update Address | RD_ADDR_DETAIL | Update address detail. |
| Company - Update Phone Person - Update Phone Site - Update Phone | RD_PHONE_DETAIL | Update phone detail. |
| Company - Update Email Person - Update Email Site - Update Email | RD_EMAIL_DETAIL | Update email detail. |

Contact Info Page

Use the Contact Info page (RD_PRSN_ADDR_BOOKS), (RD_COMP_ADDR_BOOK), or (RD_SITE_ADDR_BOOK) to access contact information for a person, worker, or contact for a company, site, or person.

Navigation:

- **Customers CRM > Add Person or Search Person > Person > Contact Info**
- **Customers CRM > Add Company or Search Company > Company > Contact Info**

Click the **Company** link.

- **Customers CRM > Add Site or Search Site > Site > Contact Info, > Site**

Click the **Site** link.

This example illustrates the fields and controls on the Company - Contact Info page. You can find definitions for the fields and controls later on this page.

Company

Save

360-Degree View

Search

Previous

Next

Add Company

Add to My Contacts

Add Task

>>

Personalize

Customer

Sparkle Clean Laundromats

Location

Little Rock, AR, USA

Contact

Becky Lee Campton

Job Title

Executive Assistant

Phone

508/714-7894

Email

blcampton@sparkle.com

Company

Account Team

Tasks

Call Reports

Notes

Contact Info

Relationships

More Info

Attributes

Contacts

Company

Sites

Contact Info Entries

Personalize

Find

View All

First

1-5 of 5

Last

| Description | Address | Phone | Email | |
|-------------|---------------------------------------------|------------------------|-------------|--|
| Business | 7623 Clearwater Rd Little Rock, AR 98745 | Business: 800/966-2546 | spk@spk.com | |
| Entry 2 | 6778 Harbor Street Benton, AR | | | |
| Entry 3 | 9090 James Ct. Jacksonville, AR | | | |
| Entry 4 | 8908 Hot Springs Creek Little Rock, AR | | | |
| Entry 5 | 909 Outlook Ave Mountain View, CA | | | |

Create Entry

Different links appear below the Contact Info tab, depending on the type of business object you are accessing. For companies or persons with the Consumer role, the **Contacts** and **Sites** links enable you to view and update the contact information of contacts and sites that are associated with the business object. For sites, you can view and update the contact information of contacts that are associated with the business object. For persons with the Contact role, you can view only the contact's own contact information.

See [Configuring Address Books](#).

Contact Info Entries

| Field or Control | Description |
|------------------|---------------------------------------------------------------------------|
| Description | Click a description to edit the contact information that is in the entry. |
| Create Entry | Click to add a new contact information entry. |

Advanced Options

Use the advanced options section to designate a contact method as primary for the business object and to edit information about the contact method.

This example illustrates the fields and controls on the Contact Info page - Advanced Options section. You can find definitions for the fields and controls later on this page.

Advanced Options

Address

Phone

Email

Address Information

*Description

Company

*Address(es) effective as of

07/23/2009

Address Summary

Customize

Find

View All

1-5 of 5

First

Last

| Primary | Address | Purpose | Start Date | End Date | Uses | Edit |
|-------------------------------------|-----------------------------------------------------------------|----------|------------|----------|------|------|
| <input checked="" type="checkbox"/> | 7623 Clearwater Rd, Little Rock, AR, 98745, USA | Business | 01/01/1900 | | | Edit |
| <input type="checkbox"/> | 6778 Harbor Street, Benton, AR, USA | Business | 01/01/1900 | | | Edit |
| <input type="checkbox"/> | 9090 James Ct., Jacksonville, AR, USA | Business | 01/01/1900 | | | Edit |
| <input type="checkbox"/> | 8908 Hot Springs Creek, Little Rock, AR, USA | Business | 01/01/1900 | | | Edit |
| <input type="checkbox"/> | 909 Outlook Ave, Mountain View, CA, USA | Business | 01/01/1900 | | | Edit |

| Field or Control | Description |
|------------------|--------------------------------------------------------------------------------------------------------------|
| Edit | Click this button to access a page where you can edit the contact method and change its start and end dates. |

Address Book Page

Use the Address Book page (ABE_DETAIL) to maintain contact information entries for a person, company, or site.

Navigation:

- Click a **Description** link in the **Contact Info Entries** grid on the Contact Info page for a company, person, or site.
- Click the **Create Entry** button on the Contact Info page for a company, person, or site.

This example illustrates the fields and controls on the Address Book page. You can find definitions for the fields and controls later on this page.

Company
Address Book - Sparkle Clean Laundromats

Contact Info Entries

*Description: Business

| Phone | | | |
|----------|--------------|--------------|---------|
| *Type | Country Code | Number | Ext/PIN |
| Business | | 800/966-2546 | |
| Cellular | | | |
| FAX | | | |
| Pager | | | |

| Email | |
|----------|---------------|
| *Type | Email Address |
| Business | spk@spk.com |
| Other | |

Address

[Look up Address](#)

*Type: Business

Physical Location

*Country: United States

Address 1: 7623 Clearwater Rd

Address 2:

Address 3:

City: Little Rock

County:

State: AR [Arkansas](#)

Postal: 98745

Time Zone: Central Time (US)

Region: Midwest - USA

☒ Sold To Address

☒ Bill To Address

☒ Ship To Address

Note: *Phone, Email, and Address* are examples of *contact methods*. When you remove a contact method, its end date is set to the current date, thereby inactivating the contact method. This occurs only if the contact method is not in any other active Contact Info entry on the component. After you inactivate a contact method, the only way to reactivate it is by changing the start and end dates that are available within the Contact Info Advanced Options section.

If your CRM installation includes Order Capture, the **Sold To**, **Bill To**, and **Ship To** check boxes appear and you can select one or more of these options to apply to the address.

See [Understanding Purchasing Options](#).

Address Search Result List Page

Use the Address Search Result List page (ABE_ADD_LOOKUP_SEC) to select an existing address to use or modify as the address for a company, person, or site.

Navigation:

Click the **Look Up Address** link on the Contact Info page for a company, person, or site.

This example illustrates the fields and controls on the Address Search Result List page. You can find definitions for the fields and controls later on this page.

Address Search Result List

Search Results [Customize](#) | [Find](#) | [View All](#) | [First](#) **1 of 1** [Last](#)

| Select | Address |
|---------------------------------------|---------------------------------------------|
| <input type="button" value="Select"/> | 7623 Clearwater Rd Little Rock, AR 98745 |

Select a listed address.

Update Address Page

Use the Update Address page (RD_ADDR_DETAIL) to update address details for a company, person, or site.

Navigation:

Expand the Advanced Options section on the Contact Info page for a company, person, or site.

Select the Address tab and click the **Edit** button next to any listed address.

This example illustrates the fields and controls on the Update Address page (1 of 2). You can find definitions for the fields and controls later on this page.

Company

Update Address

Address Information

*Purpose

Physical Loc

*Country

Address 1

Address 2

Address 3

City

County

State Arkansas

Postal

Phone

Time Zone Central Time (US)



Region









This example illustrates the fields and controls on the Update Address page (2 of 2). You can find definitions for the fields and controls later on this page.

Original Date Address is Effective

Start Date 01/01/1900 End Date 12/31/2999

Current Date Address is Effective

Start Date  End Date 

| Roles Address Applies to | | |
|--------------------------|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| Description | Start Date | End Date |
| Ship To Organization | 01/01/1900  | <input type="text"/>  |
| Bill To Organization | 01/01/1900  | <input type="text"/>  |
| Sold To Organization | 01/01/1900  | <input type="text"/>  |
| Company | 01/01/1900  | <input type="text"/>  |

Search for Existing Address

Create Using Entered Address

[Return to Address Summary Page](#)

* Required Field

| Field or Control | Description |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Search for Existing Address | Click to search the existing addresses for a company. The system returns addresses that match the address information that you enter in the Address Information page region. |
| Create Using Entered Address | Click to create the address by using the information that you enter. |

Address Effective Dates and Applications

Enter the start date and end date that the address is effective.

Roles Address Applies to

This region lists all the roles that are assigned to the business object. By default, the address applies to all the business object roles. You can enter a start date and end date for each role to inactivate the address that is defined for the role.

Update Phone Page

Use the Update Phone page (RD_PHONE_DETAIL) to update phone details for a company, person, or site

Navigation:

Expand the Advanced Options section on the Contact Info page for a company, person, or site.

Select the Phone tab and click the **Edit** button next to any listed.

This example illustrates the fields and controls on the Update Phone page. You can find definitions for the fields and controls later on this page.

Company

Update Phone

Phone Information

*Purpose Business

Country Code

*Number 800/966-2546

Extension

Phone Effective Dates and Applications

Original Date Phone is Effective

Start Date 01/01/1900 End Date 12/31/2999

Current Date Phone is Effective

Start Date End Date

Roles Phone Applies to

| Description | Start Date | End Date |
|-------------|------------|----------|
| Company | 01/01/1900 | |

OK

[Return to Phone Summary Page](#)

* Required Field

Phone Effective Dates and Applications

Enter the start date and end date on which the phone number is effective.

Roles Phone Applies to

This region lists all the roles that are assigned to the business object. By default, the phone number applies to all the business object roles. You can enter a start date and end date for each role to inactivate the phone for the role.

Update Email Page

Use the Update Email page (RD_EMAIL_DETAIL) to update email detail.

Navigation:

Expand the Advanced Options section, select the Email tab, and click the **Edit** button next to any listed email address.

This example illustrates the fields and controls on the Update Email page. You can find definitions for the fields and controls later on this page.

Company

Update Email

Email Information

***Purpose** Business

***Email Address** spk@spk.com

Email Effective Dates and Applications

Original Email is Effective

Start Date 10/30/2001 **End Date** 12/31/2999

Current Email is Effective

Start Date **End Date**

| Roles Email Applies to | | |
|------------------------|------------|----------------------|
| Description | Start Date | End Date |
| Company | 10/30/2001 | <input type="text"/> |

[Return to Email Summary Page](#)

* Required Field

Email Effective Dates and Applications

Enter the start date and end date that the email is effective.

Roles Email Applies to

This region lists all the roles that are assigned to the business object. By default, the email applies to all the business object roles. You can enter a start date and end date for each role to inactivate the email for the role.

Related Links

[Setting Up Contact Methods](#)

Defining Customer Contacts

This topic discusses how to define contacts for a customer.

Pages Used to Define Customer Contacts

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|----------------------------|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Person - Contacts | RD_CONSUMER_REP | Maintain the list of contacts for a person. You can only define contacts for a person with the consumer role. |
| Company - Contacts | RD_COMPANY_CNTCT_2 | Maintain the list of contacts that are defined for a company. |
| Site - Contacts | RD_SITE_CNTCT_2 | Maintain the list of contacts for a site. |
| Create Contact of <object> | RBQ_QCREATE | Create a contact of a company, consumer, or site. |
| Modify <contact> | ABE_DETAIL | Maintain contact information entries for a contact of a company, consumer, or site. This page is similar in format and usage to the Create Contact of <customer> page. |

Maintaining the Contact List

Use the Contacts page (RD_CONSUMER_REP, RD_COMPANY_CNTCT_2 or RD_SITE_CNTCT_2) to maintain the list of contacts for a person, company, or site.

Navigation:

- **Customers CRM > Add Person or Search Person > Person > Details or Summary**

Click the **Add Consumer Information** or **Edit Consumer Information** link.

Select the Contact Info tab and click the **Contacts** link.

- **Customers CRM > Add Company or Search Company > Company > Details or Summary**

Select the Contact Info tab, and click the **Contacts** link.

- **Customers CRM > Add Site or Search Site > Site > Primary**

Select the Contact Info tab.

Click the **Contacts** link.

This example illustrates the fields and controls on the Contact Info - Contacts page. You can find definitions for the fields and controls later on this page.

Person (Consumer)

Save | 360-Degree View | Search | Previous | Next | My Contacts | >> | Personalize

Name Kelsey Baker **Phone Number** 001-0015554442200
Email Address kbaker@bakerhousehold_htech.com **Customer ID** CHT22

Person | Account Team | Tasks | Call Reports | Billing Accounts | Plans | Notes | Contact Info | D

Person | **Contacts** | Sites

Contact Summary Customize | Find | View All | 1 of 1 | First | Last

| Primary | Name | Phone | Email Address | |
|-------------------------------------|------------|--------------|---------------|-------------------------------------------------|
| <input checked="" type="checkbox"/> | Jane Finch | 925/694-1919 | | Edit Inactivate |

[Add Contact](#)

This page enables you to add contacts of a customer business object and edit or inactivate existing contacts.

Create Contact of <object> Page

Use the Create Contact of <object> page (RBQ_QCREATE) to create a contact of a company, consumer, or site.

Navigation:

Click the **Create Entry** button on the Contacts page for a company, consumer, or site.

This example illustrates the fields and controls on the Create Contact of <customer> page (1 of 2). You can find definitions for the fields and controls later on this page.

Create Contact Of Kelsey Baker

SetID HTECH
High Tech SetID

Consumer

Name [Kelsey Baker](#)
Currency US Dollar

Purchasing Options

| | |
|------------------------------------------------------|--------------------------------------|
| <input checked="" type="checkbox"/> Sold To Customer | This consumer can make purchases. |
| <input checked="" type="checkbox"/> Bill To Customer | This consumer can receive bills. |
| <input checked="" type="checkbox"/> Ship To Customer | This consumer can receive shipments. |

Contact Info Entries

Contact Info Entry Home Display Entry

Contact Info

Description Home

| Phone | | | |
|----------|--------------|---------------|---------|
| Type | Country Code | Number | Ext/PIN |
| Business | 001 | 0015554442200 | |

Address

Address Business
11754 15th Ave NE
Seattle, WA 98125
[More...](#)

Email

| Type | Email Address |
|------|---------------------------------|
| Home | kbaker@bakerhousehold_htech.com |

This example illustrates the fields and controls on the Create Contact of <customer> page (2 of 2). You can find definitions for the fields and controls later on this page.

| Contact | | | |
|---------------------------------------------------------|-----------------|-------------------------------------|----------|
| Search Existing Person | | | |
| Format for | United States ▼ | | |
| Prefix | | | |
| *First Name | | | |
| *Last Name | | | |
| Title | | | |
| Middle Name | | | |
| Suffix | | | |
| Purchasing Options | | | |
| Sold To Contact | Non-primary ▼ | This contact can make purchases. | |
| Bill To Contact | Non-primary ▼ | This contact can receive bills. | |
| Ship to Contact | Non-primary ▼ | This contact can receive shipments. | |
| Contact Info Entries | | | |
| Contact Info | | | |
| *Description Home | | | |
| Phone | | | |
| *Type | Country Code | Number | Ext./PIN |
| Home ▼ | | | |
| Cellular ▼ | | | |
| FAX ▼ | | | |
| Pager ▼ | | | |
| Email | | | |
| *Type | Email Address | | |
| Home ▼ | | | |
| Other ▼ | | | |
| Address | | | |
| <input type="checkbox"/> Use Consumer Address | | | |
| Look up Address More... | | | |
| *Type | Home ▼ | | |
| *Country | United States ▼ | | |
| Address 1 | | | |
| Address 2 | | | |
| Address 3 | | | |
| City | | | |
| County | | | |
| State | | | |
| Postal | | | |
| <input type="button" value="Apply Changes"/> | | | |

The first section of this page contains information about the customer, to provide context for the contact that is being added.

Contact

Enter contact information about the contact in this section.

Purchasing options appear after you create or update a contact only if option is enabled on the parent component's primary page. The contact must have at least one address defined before you can select purchasing options.

| Field or Control | Description |
|--------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sold To Contact, Bill To Contact, and Ship To Contact | Select whether the contact is primary or non primary for each purchasing option that appears. The available purchasing options are inherited from the customer's purchasing options. If you do not select a value for the purchasing option, the contact is not enabled for that option. |
| Search Existing Person | Click to search the database for a person whose information matches the information that you enter on this page. A page appears on which you can select a person to add as a contact. |
| Use <customer> Address | Select to use the customer's address for the contact. |

Related Links

[Defining Information for Business Contacts](#)

Defining Customer Sites

This topic lists the pages used to maintain site lists.

Pages Used to Define Sites

| Page Name | Definition Name | Usage |
|---------------------------|------------------------|------------------------------------------------------------------------------------------------------------|
| Company - Sites | RD_COMPANY_SITE_2 | Maintain company sites. |
| Person - Sites | RD_CONSUMER_SITE_2 | Maintain sites for a person. You can only maintain sites for a person with the consumer role. |
| Create Site of <customer> | RBQ_QCREATE | Add a site to a company or person. This page is similar in usage to the Create Contact of <customer> page. |
| Modify <site> | RBQ_QCREATE | Maintain contact information and purchasing options for a customer site. |
| Merge Request for Sites | RBQ_QCREATE | Submit two or more sites for merge evaluation. |

Sites Page

Use the Sites page (RD_COMPANY_SITE_2) or (RD_CONSUMER_SITE_2) to maintain sites for a company or person.

Navigation:

- **Customers CRM > Add Company or Search Company > Company > Contact Info**

Click the **Sites** link.

- **Customers CRM > Add Person or Search Person > Person > Details or Summary**

Click the **Add Consumer Information** or **Edit Consumer Information** link.

Select the Contact Info tab and click the **Sites** link.

This example illustrates the fields and controls on the Company Sites page. You can find definitions for the fields and controls later on this page.

Company

Save

360-Degree View

Search

Previous

Next

Add Company

Add to My Contacts

Add Task

>>

Personalize

Customer

MMA Property Management Group

Location

Circle Pines, MN, USA

Contact

Teri Thomas

Job Title

Management Associate

Phone

651/785-2546

Email

tthomas@mma.com

Company

Account Team

Tasks

Call Reports

Notes

Contact Info

Relationships

More Info

Attributes

Contacts

Company

Sites

Contact Summary

Personalize

Find

View All

First

1-6 of 6

Last

| Primary | Name | Phone | Email Address | | |
|-------------------------------------|----------------|--------------------|----------------------------------------|------|------------|
| <input type="checkbox"/> | Elssie Tripper | 925/694-2001 | crm_worker_24@ap6023fems.us.oracle.com | Edit | Inactivate |
| <input type="checkbox"/> | Alan Bailey | | | Edit | Inactivate |
| <input checked="" type="checkbox"/> | Teri Thomas | 651/779-3232(4569) | tthomas@mma.com | Edit | Inactivate |
| <input type="checkbox"/> | Bill Hauser | 651/785-9431 | bhauser@mma.com | Edit | Inactivate |
| <input type="checkbox"/> | Barb Johnson | 651/785-2344 | bjohnson@mma.com | Edit | Inactivate |
| <input type="checkbox"/> | Fred Albright | 651/785-6687 | falbright@mma.com | Edit | Inactivate |

Add Contact

View and edit the list of sites that are defined for the customer or click the **Create Site** button to create a new site.

Defining Purchasing Options for Companies, Consumers, and Sites

Understanding Purchasing Options

If you have installed PeopleSoft Order Capture, you can designate purchasing options for customer companies, consumers, or sites. Purchasing options in PeopleSoft Customer Relationship Management (PeopleSoft CRM) control whether a customer can make purchases (sold-to), receive shipments (ship-to), or receive invoices (bill-to).

Defining purchasing options is a two-step process. First, you enable purchasing options for the customer. You then select the purchasing options that apply to each contact that you define for a company, consumer, or site and for each site that you define for a company or consumer.

If a company, consumer, or site is defined as a sold-to customer, you can define related customers to receive the bills or shipments. Defining related customers manages those situations for which a company's purchasing and payment processing are done centrally, but the ordered products are typically shipped to other corporate sites.

Purchasing Option Integrations

Other systems, including PeopleSoft Financial Management Solutions, PeopleSoft Supply Chain Management, and third-party systems, capture and use purchasing information. You can use enterprise integration points (EIPs) to synchronize purchasing option information with these systems.

Sites that are flagged as bill-to or sold-to in PeopleSoft CRM are integrated in PeopleSoft Supply Chain Management as customers. PeopleSoft CRM ship-to sites are integrated in PeopleSoft Supply Chain Management as addresses of sites with which the site is currently associated.

PeopleSoft Financial Management Solutions and PeopleSoft Supply Chain Management also enable you to define additional attributes and processing options and to view the updated information in PeopleSoft CRM. See *PeopleSoft FSCM: Application Fundamentals*.

Related Links

[Understanding the Company Component](#)

[Understanding Sites](#)

[Understanding Persons](#)

[Understanding Workers in CRM](#)

[Understanding Enterprise Integration Technology](#)

Defining Purchasing Options for Customers

This topic discusses how to define purchasing options.

Pages Used to Define Purchasing Options for Customers

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---------------------------|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| Company - Details | RD_COMPANY_DETAILS | Select purchasing options for the company. |
| Company - Purchasing Info | RD_COMPANY_CUST_OP | Enter purchasing option details for the company. |
| Site - Details | RD_SITE_MAIN_2 | Select purchasing options for the site. |
| Site - Purchasing Info | RD_SITE_CUST_OP_2 | Enter purchasing option details for the site. |
| Person - Details | RD_CONSUMER_BC_OPT | Enable purchasing options for the selected consumer. Purchasing options for Persons are available only for a person with the Consumer role. |
| Person - Purchasing Info | RD_CONSUMER_BC_OPT | Enable purchasing options for the selected consumer. Purchasing options for Persons are available only for a person with the Consumer role. |

Purchasing Info Page

Use the Purchasing Info page (RD_COMPANY_CUST_OP) or (RD_SITE_CUST_OP_2), or (RD_CONSUMER_BC_OPT) to enter purchasing option details for the company, site, or consumer.

Navigation:

- Customers CRM, Add Company or Search Company, Company
Click the **Purchasing Info** link.
- Customers CRM, Add Site or Search Site, Site
Click the **Purchasing Info** link.
- Customers CRM > Search Person > Add Person or Person**

Click the **Purchasing Info** link on the Person page for a person with the Consumer role.

Note: The example shown is from the Company component. The Purchasing Info pages for the Consumer and Site components offer similar functionality.

This example illustrates the fields and controls on the Company - Purchasing Info page. You can find definitions for the fields and controls later on this page.

CompanyAccount TeamTasksCall ReportsNotesContact InfoRelationshipsMore InfoAttributes

SummaryDetailsPurchasing InfoTax Exempt Certificate

Purchasing Options

☒ **Sold To Customer**

This company can make purchases.

Sold To Options

Send Purchases To

PrimaryCustomer Name

☒ MMA Property Management Group

Send Bills To

PrimaryCustomer Name

☒ MMA Property Management Group

☒ **Bill To Customer**

This company can receive bills.

Billing Options

Receive Bills for Purchases Made By

No customer selects this company for receiving bills.

☒ **Ship To Customer**

This company can receive shipments.

Shipping Options

Receive Shipments for Purchases Made By

No customer selects this company for receiving shipments.

| Field or Control | Description |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sold To Customer | Indicates that the customer or customer site can purchase products or services. If you select this option, you can designate other customers or customer sites to receive invoices and shipments for the purchases that this customer makes. |
| Bill To Customer | Indicates that the customer or customer site can receive invoices for purchases. If you select this option, you can designate other customers or customer sites for which the customer receives invoices. |
| Ship To Customer | Indicates that the customer or customer site can receive shipments for products or services. If you select this option, you can designate other customers or customer sites as purchasers of the products or services that this site receives. |

Sold-To Options

Click the **Sold-To Options** link.

This example illustrates the fields and controls on the Purchasing Info: Sold-To Options page. You can find definitions for the fields and controls later on this page.

CompanyAccount TeamTasksCall ReportsNotesContact InfoRelationshipsMore InfoAttributes

SummaryDetailsPurchasing InfoTax Exempt Certificate

Sold-To Options

Find | View AllFirst1 of 1Last

Effective Date01/01/2000

☒ Allow Product Substitutions

☐ Restocking Fee

Product ID Preference

☒ System Product ID

☐ Customer Product ID

Freight Charge Method

Shipping Container Label

Carton Label Format

Pricing Options

Discount Days

Arbitration Plan

Exclusive Pricing ID

Load Price Rule

This view displays sold-to options that are established in PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management.

Shipping Options

Click the **Shipping Options** link.

This view displays ship-to options that are established in PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management.

Billing Options

Click the **Billing Options** link.

This view displays bill-to options that are established in PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management. You can enter values for the following fields in PeopleSoft CRM.

| Field or Control | Description |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Credit Analyst | <div>Select the code for the credit analyst who works with the customer. This field is required for successful integration with Financial Management Solutions or Supply Chain Management.</div> <div>See Credit Analyst Page.</div> |

| Field or Control | Description |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Collector | <p>Select the code for the collector who works with the customer. This field is required for successful integration with Financial Management Solutions or Supply Chain Management. Collector codes are established on the Collector page under Set Up CRM, Common Definitions, Customer. Default EIP collector code values are specified on the Interface Defaults page under Set Up CRM, Common Definitions, Integration Rules, Integration Defaults.</p> <hr/> <p>Note: You must manually synchronize credit analyst and collector codes among CRM, Financial Management Solutions, and Supply Chain Management to ensure successful integration with these systems. Customer EIP application messages will fail if they include codes that are not available in the subscribing system.</p> <hr/> |
| Payment Terms Code | Enter the payment terms for informational purposes. |

Important! Perform updates to the customer's bill-to options, including changes to the credit analyst or collector codes, in the Financial Management Solutions or Supply Chain Management systems.

Selecting Purchasing Options for Customer Addresses

This topic discusses how to select purchasing options for addresses.

Pages Used to Select Purchasing Options for Customer Addresses

| Page Name | Definition Name | Usage |
|--------------------------|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Contact Info Page</u> | ABE_DETAIL | <p>Select purchasing options that apply to an address of a company, site, or consumer.</p> <p>Purchasing options are available from the Person component only if the person has the Consumer role.</p> |

Contact Info Page

Use the page Contact Info (ABE_DETAIL) to select purchasing options that apply to an address of a company, site, or consumer.

Navigation:

- Customers CRM, Search Company, Company, Contact Info

Click the **Addresses** link.

Click a **Description** link.

- Customers CRM, Search Site, Site, Contact Info

Click the **Addresses** link.

Click a **Description** link.

- Customers CRM, Search Person, Person, Summary

Click the **Add Consumer Information** link.

Select the Contact Info tab.

Click the **Addresses** link.

Click a **Description** link.

See [Maintaining Contact Information for Business Objects](#).

Selecting Purchasing Options for Customer Contacts

This topic discusses how to define purchasing options for customer contacts.

Pages Used to Select Purchasing Options for Customer Contacts

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---------------------------------------|-------------------------------|----------------------------------------------------------------------------------------------------------------------|
| Person - Contacts | RD_CONSUMER_REP | Maintain the list of contacts for a person. You can only define contacts for a person with the Consumer role. |
| Company - Contacts | RD_COMPANY_CNTCT_2 | Maintain the list of contacts for a company. |
| Site - Contacts | RD_SITE_CNTCT_2 | Maintain the list of contacts for a site. |
| Contact Info Page | ABE_DETAIL | Select purchasing options that apply to an address of a company, site, or person. |
| Maintain Contact Page | RBQ_QCREATE | Maintain purchasing options for a contact. Designate a contact as primary for a purchasing option. |

Contact Info Page

Use the Contact Info page (ABE_DETAIL) to select purchasing options that apply to an address of a company, site, or person.

Navigation:

Click the **Add Contact** button next to a listed contact on the Contacts page for a company, site, or person with the Consumer role.

See [Maintaining Contact Information for Business Objects](#).

Maintain Contact Page

Use the Maintain Contact page (RBQ_QCREATE) to maintain purchasing options for a contact.

Designate a contact as primary for a purchasing option.

Navigation:

Click the **Edit Contact** button next to a listed contact on the Contacts page for a company, site, or person with the consumer role.

See [Defining Customer Contacts](#).

Selecting Purchasing Options for Customer Sites

This topic discusses how to define purchasing options for customer sites.

Pages Used to Select Purchasing Options for Customer Sites

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-----------------------------------------------|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Company - Sites | RD_COMPANY_SITE_2 | Maintain company sites. |
| Person - Sites | RD_CONSUMER_SITE_2 | Maintain sites for a person. You can only maintain sites for a person with the Consumer role. |
| Company - Edit Site Person - Edit Site | RD_CUST_SITE_DTL | Select purchasing options for a customer site. Purchasing options are available from the Person component only if the person has the Consumer role. |
| Company - Create Site Person - Create Site | RD_CUST_SITE_DTL | Select purchasing options for a customer site. |

Related Links

[Defining Customer Sites](#)

Contact Info Page

Access the Contact Info page for a customer site.

See [Defining Customer Sites](#).

Chapter 6

Defining Tax Exempt Certificate Information for Companies, Consumers and Sites

Understanding Tax Exempt Certificates

Various types of organizations are exempt from paying sales tax, state hotel occupancy tax and, if incorporated, franchise tax. The exemptions vary, depending upon the type of organization. Organizations include charitable, educational, and religious.

Government entities are frequently asked to provide a tax-exempt number or *determination* letter to prove status as a tax-exempt or charitable entity. For example, applications for grants from a private foundation or a charitable organization generally require this information as part of the application process. In addition, donors frequently ask for this information as substantiation that the donor’s contribution is tax deductible, and vendors may ask for this to substantiate that the organization is exempt from sales or excise taxes.

Note: Exemption from sales taxes is made under state, not Federal, law.

Tax exemption details are displayed and maintained on the Company, Consumer, and Site components. Updates to the Tax Exempt Certificate information is published to Supply Chain Management.

Tax exempt information created in PeopleSoft CRM can be viewed and edited in PeopleSoft SCM and tax exempt information created in PeopleSoft CRM can be viewed and edited in PeopleSoft SCM.

Working with Tax Exempt Certificate Information

This topic discusses how to enter and maintain Tax Exempt Certificate information.

Page Used to Work with Tax Exempt Certificate Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|------------------------------------|-------------------------------|------------------------------------------------------------|
| <u>Tax Exempt Certificate Page</u> | RD_TAX_EXEMPT_COMP | Add, delete, or modify Tax Exempt Certificate information. |

Tax Exempt Certificate Page

Use the Tax Exempt Certificate page (RD_TAX_EXEMPT_COMP) to add, delete, or modify Tax Exempt Certificate information.

Navigation:

Click the **Tax Exempt Certificate** link on the Company - Summary page.

Click the **Tax Exempt Certificate** link on the Consumer - Summary page.

Click the **Tax Exempt Certificate** link on the Site - Summary page.

This example illustrates the fields and controls on the Tax Exempt Certificate page. You can find definitions for the fields and controls later on this page.

Company

Save | 360-Degree View | Search | Previous | Next | Add Company | Add to My Contacts | Add Task | >> Personalize

Customer MMA Property Management Group
Contact Teri Thomas
Phone 651/785-2546

Location Circle Pines, MN, USA
Job Title Management Associate
Email tthomas@mma.com

Company | Account Team | Tasks | Call Reports | Notes | Contact Info | Relationships | More Info | Attributes

Summary | Details | Purchasing Info | **Tax Exempt Certificate**

Tax Exempt Certificate Find | View All First 1 of 1 Last

*Exemption Certificate

Issuing Authority

Authority Type

Add Certificate Data

| Field or Control | Description |
|----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Exemption Certificate and Issuing Authority | Record multiple tax exemption certificates for each customer and select an authority type to classify the issuing authority. For each exemption certificate, enter an effective date, status, issued date, and expiration date. |
| Tax Exempt Category | Specify the exemption category for which the customer qualifies with this purchase: <ul style="list-style-type: none"> <i>Blanket:</i> Exemption category exists for all purchases of this type. <i>Single Purchase:</i> Exemption category exists for the specified purchase only. <i>Other:</i> You've defined another exemption category. |
| Exempt License | Select the check box to denote that a tax-exempt license is issued to the customer. |

Working with Business Object Profiles

Understanding Profiles

A profile is a PeopleSoft Customer Relationship Management (CRM) business tool with multiple uses. Profiles reference data to and from the Customer Data Model (CDM), transactional tables, or user defined profile tables. Use profiles to:

- Define target audiences for use in marketing activities.
- Create questions in PeopleSoft Online Marketing web-based documents.
- Merge stored profile attribute values into PeopleSoft Online Marketing email or web-based documents.
- Bring data from external sources into the CDM using Customer Relationship Management Data Import.
- Create CDM attributes that are viewable and editable in CDM components.
- Enable analysis of profile data using Marketing Insight (requires modification of ETL maps).

System and User-Defined Profile Data

Customer Relationship Management uses the Customer Data Model as a centralized data storage repository to retain extensive individual and organization information. To maximize system performance, PeopleSoft Marketing and Online Marketing use a subset of the CDM data that is stored in a set of three basic data tables. When additional individual or organization information is needed but not contained in the delivered data tables, PeopleSoft Marketing enables you to define new profiles and profile fields in the language that you want. A system administrator uses PeopleSoft Application Designer to create the corresponding physical tables and fields and then maps them to the requested definitions. Whether data resides in the predefined system tables or your user-defined profile tables, You can use it for all functions by using one or more profiles.

PeopleSoft CRM delivers two profiles with the system, one for individuals and one for organizations. The two delivered profiles are listed with the profile name People under the type Individual and Companies under the type Organization. The Individual: People and Organization: Company profiles cover profile needs related to basic contact data (for example, name, address, company name, and so on). Additionally, each user-defined profile table has a corresponding profile to reference the data that is stored there. Use profiles in combination to access information in any or all tables.

Note: When moving profiles between environments, you should always manually re-create them. Moving profiles using Data Mover is not supported.

Profile Usage

Consider these examples of the various ways to use profiles.

Suppose that your company operates a national chain of pet supply stores and that you are part of the team charged with making your marketing efforts more effective. Your team believes that one way to accomplish this is by targeting current and potential customers with promotions that are specific to the pets they own, and you decide to test it with an online marketing campaign. As part of the campaign, you purchase a list of subscribers to various pet magazines. Using your Individual: People profile, import the subscriber list into your Customer Relationship Management database.

Using your Individual: People profile, you can create a target audience of customers who have an email address on record. Use PeopleSoft Online Marketing to create an online dialog and send that target audience an email broadcast offer. The email directs respondents to a PeopleSoft Online Marketing web page that offers a free gift for each pet in the household. To receive the gift, respondents must enter or update information about each pet.

A few months ago, your company started gathering data on customers' pets. At that time, a user-defined profile was created to store several pieces of information. The web page to which you directed the respondents was created in PeopleSoft Online Marketing using your individual: people and pet profiles. As you created the page, you used several of the profile fields to display questions. As respondents answer the questions, the respondent's profile data is updated in the Customer Relationship Management database in real time.

When the information gathering phase of the dialog is complete, you launch another follow-up email that is targeted to the respondents. This time, you use the individual people and pet profiles to tailor email messages and promotions. While viewing the types of information that are gathered by these profiles, you see that you can differentiate customers by the type of pet they own. Using the Pet type as a search criteria, you create separate emailing lists for Cat, Dog, Rodent, Horse, and Bird. When the results are in, you find that this personalized, targeted approach is far more effective than other marketing efforts and you decide to expand it to your entire customer base.

Note: The People profile is a system profile. While you can make changes to it (for example, changing existing fields or adding new ones), this activity is considered customization.

Profiles and Marketing Center Security

If you have enabled Marketing Center Security, when you create a profile you can designate it as secure. When performing a search for profiles, only those secured profiles that a user has permission to access (that is, that they are authorized for at least one of the Marketing Centers associated with the profile) will be displayed as part of the search results. Profile definition functionality for documents and audiences will only display profiles that the user is authorized to access.

Note: Only custom profiles (that is, not AAF based profiles such as Case History and so forth) will be available for security. The People profile, because it should always be available for all users, cannot be secured.

See the product documentation for *PeopleSoft EPM CRM Warehouse*.

Related Links

PeopleSoft Online Marketing

PeopleSoft Marketing

[Understanding the Data Import Application Engine Process \(RBIMPORT\)](#)

Profile Data in the CDM

PeopleSoft CRM Online Marketing enables marketers to define profiles and profile fields that collect customer profile information, online, such as color or brand preference. After the marketers register and activate profiles and profile fields, you can configure profile groups that enable CDM components to access profile data. You can also set up the configurable search to use profile fields as search criteria.

To configure profile data for displaying and updating in CDM components, define a profile group that includes the profile fields and attach the profile group to CDM components. You can also use the Active Analytics Framework (AAF) to define conditions under which the profile data appears.

See “Understanding AAF” (Automation and Configuration Tools) and “Understanding the Use of Active Analytics Framework in CRM” (Automation and Configuration Tools).

The More Info page of the Company and Person components enables you to view and update profile information. Read-only profile data appears on the Summary page of the Company component.

Note: You can specify that the profile group data appears as read-only on the More Info page.

Related Links

“Understanding the Configurable Search” (Automation and Configuration Tools)

Common Elements Used When Working With Profiles

This topic lists common elements used in these topics and discusses profile data in the customer data model (CDM).

| <i>Term</i> | <i>Definition</i> |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Profile Field | A specific bit of information that is captured about the customer. For example, contact lens customers of an optical supply seller might have profile fields for the preferred color, preferred type (extended wear or daily wear), brand preference, optometrist, prescription, date of last purchase, and care kit provided. Profile fields are keyed by BO_ID. |
| Profile Group | An arbitrary collection of profile fields for display purposes. For example, the optical supply seller might have a profile group for contact lens information, eyeglass information, and sunglass information. |

| Term | Definition |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Condition | <p>Information that controls when the profile group is displayed. After you set up profile groups, you can define the conditions for displaying and updating a profile group in a component. A read-only profile summary appears on the primary page for every component that meets the conditions, and a profile information page for updating profiles is added to the component.</p> <p>For example, the condition for displaying the Contact Lens Info profile group in the Consumer component is that the consumer either previously purchased contact lenses or has requested contact lens information.</p> |

Specifying a Profile Prefix

This topic discusses how to specify a profile prefix.

Page Used to Specify a Profile Prefix

| Page Name | Definition Name | Usage |
|------------------------------------|------------------------|--------------------------------------------------------------------------------------------|
| Profile Setup Page | RA_PROFILE_SETUP | Specify a profile record prefix for manually mapped user-defined profile records (tables). |

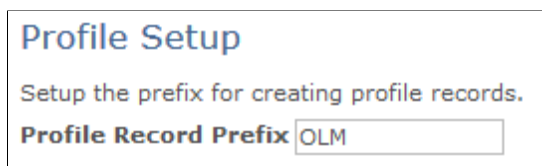
Profile Setup Page

Use the Profile Setup page (RA_PROFILE_SETUP) to specify a profile record prefix for manually mapped user-defined profile records (tables).

Navigation:

Set Up CRM > Common Definitions > Profile Management > Profile Setup

This example illustrates the fields and controls on the Profile Setup page. You can find definitions for the fields and controls later on this page.



The screenshot shows the 'Profile Setup' page header in blue. Below it is a subtitle 'Setup the prefix for creating profile records.' followed by the label 'Profile Record Prefix' in bold. To the right of the label is a text input field containing the value 'OLM'.

Designate a profile record prefix to use with user-defined profile records (tables). The prefix must follow the standard PeopleSoft record prefix standards. Only tables with the profile record prefix are available on the Profile Registration page.

Creating a Profile Request

These topics provide an overview of profile requests and discuss how to:

- Define basic profile information.
- Add and edit profile fields.
- Define field detail.
- Modify active profiles.

Pages Used to Create a Profile Request

| Page Name | Definition Name | Usage |
|--------------------------------------------|------------------------|----------------------------------------------------------------------------------------------------------------|
| Profiles | RA_PROFILE_SUMM | View summary information about all of your profiles and to access an existing profile or create a new profile. |
| <u>Profile Page</u> | RA_PROFILE_DTL | Define basic information about the profile. |
| <u>Profile Fields - Field Summary Page</u> | RA_ATTRIBUTE_SUMM | Add new fields to a profile, or view existing profile fields. |
| <u>Profile Fields - Field Detail Page</u> | RA_ATTRIBUTE_DTL | Define a new profile field or edit an existing profile field. |
| <u>Profile - Marketing Center Page</u> | RA_PROFILE_MKTCTR | Secure a profile by Marketing Center. |

Understanding Profile Requests

A profile request consists of instructions that you or a system administrator use to create a new database table and fields. Your request conveys the type of information that you need and how to use it. The profile is not available for use until you register and activate it. To assist with the communication process of marketer's requests and fulfillment or rejection of those requests by the system administrator, workflow is delivered. Marketing analysts can request profiles, and when they are set to a status of *Requested*, the person in the defined role of Dialog Administrator receives a worklist notification. When the request is either completed and activated, or rejected, the marketing administrator receives a worklist notification.

Creation of profiles should always follow thoughtful design of campaign objectives and strategy. Before beginning to define a profile request, determine who you want to contact (your target audience), what information you want to display, what new information you want to collect, and what existing information you want to update. Profile creation requires a thorough knowledge of your Customer Relationship Management database (to ensure that you are not creating a duplicate profile or profile field) and involves a collaboration between the marketer and the system administrator.

Note: If you have purchased PeopleSoft Online Marketing, you cannot use the following characters in profiles being used for Online Marketing documents: ampersand (&), apostrophe or single quote ('), double quote ("), greater than (>), less than (<), or period (.).

Profile Page

Use the Profile page (RA_PROFILE_DTL) to define basic information about the profile.

Navigation:

Set Up CRM > Common Definitions > Profile Management > Profile Definitions

- Click the profile name on the Profiles page to edit an existing profile.
- Click the **Add Profile** button on the Profiles page to define a new profile.

This example illustrates the fields and controls on the Profile page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Profiles' page interface. At the top, there's a header with the title 'Profiles' and a row of buttons: 'Save', 'Refresh', 'Add Profile', 'Clone Profile', and 'View All'. A 'Personalize' link is on the right. Below the buttons, there are two main sections. The first section contains 'Group Type' set to 'Individuals', 'Rows Per Contact' set to 'One row', 'Profile Name' set to 'People', and 'Status' set to 'Activated'. The second section, titled 'Profile', contains 'Category' set to 'Individuals', 'Profile Name' set to 'People', 'Description' set to 'Individuals:People Profile', '*Status' set to 'Activated' (with a dropdown arrow), and 'Rows' set to 'One row'.

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Group Type | <p>Select <i>Individuals</i> when the profile information refers to persons.</p> <p>Select <i>Organizations</i> when the profile information refers to organizational data.</p> |
| Category | Shows the category to which the profile belongs. |

| Field or Control | Description |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Status | <p>Select <i>In Design</i> while you are defining your profile request.</p> <p>Select <i>Requested</i> to lock the profile design. Setting the status to <i>Requested</i> notifies your administrator that the profile design is complete. The administrator can manage approval and connect the profile to the database.</p> <p>Select <i>Activated</i> to indicate that the profile fields have been mapped and the required profile table has been created.</p> <p>Select <i>Rejected</i> to indicate that the profile design has been rejected by your system administrator.</p> <p>Select <i>Update</i> to edit an activated profile.</p> <hr/> <p>Note: As long as the status of a profile is <i>In Design</i>, your ability to edit and make changes is unlimited. A status of <i>Requested</i> or <i>Rejected</i> allows you to delete any profile field that is in a status of <i>In Design</i>. When the profile status is set to <i>Activated</i>, your ability to change or edit the profile is limited. For example, when a profile is activated you cannot delete a field. Likewise, you cannot delete field choices, but you can inactivate them.</p> <hr/> |
| Profile Name | <p>Enter a name for the profile.</p> <hr/> <p>Note: If you have purchased PeopleSoft Online Marketing, you cannot use the following characters in profile names used for Online Marketing documents: ampersand (&), apostrophe or single quote ('), double quote ("), greater than (>), less than (<), or period (.).</p> <hr/> |
| Rows | <p>Row selection determines how many unique rows of data you can enter into the profile table for each contact. You can define profiles as either one row or many rows. After a profile is requested, you cannot change the row selection.</p> <p>Select <i>Many Rows</i> to allow multiple rows of data per contact.</p> <p>Select <i>One Row</i> to allow only one row of data per contact.</p> <p>For example, suppose that you use a one-row table to store information about whether your customer is a pet owner and how many pets your customer owns. If you want to store the names of the pets, you must allow for the possibility that your customer has more than one dog or cat. To record the names of multiple pets, you must use a Many Row table.</p> <hr/> <p>Note: Profiles defined as <i>Many Rows</i> can be used only for audience selection. They cannot be used in online documents by PeopleSoft Online Marketing.</p> <hr/> |

| Field or Control | Description |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Profile Can Be Updated | Select this check box if the profile is available for update (for example, by customers changing their information on an Online Marketing web page form). If you mark profiles to not allow updates, the profile fields cannot be marked as questions. |
| Secured Profile | Select this check box to designate a profile as secured. When performing a search for profiles, only those secured profiles that a user has permission to access (that is, that they are authorized for at least one of the Marketing Centers associated with the profile) will be displayed as part of the search results. |

Profile Fields - Field Summary Page

Use the Profile Fields - Field Summary page (RA_ATTRIBUTE_SUMM) to add new fields to a profile, or view existing profile fields.

Navigation:

Select the Profile Fields tab on the Profile page.

This example illustrates the fields and controls on the Profile Fields - Field Summary page. You can find definitions for the fields and controls later on this page.

Profiles

Save Refresh | Add Profile | Clone Profile | View All Personalize

Group Type: Individuals Profile Name: People
Rows Per Contact: One row Status: Activated

Profile Profile Fields

Field Summary Field Detail

Profile Fields Personalize Find View All First 1-40 of 53 Last

| Order | Name | Use Type | Description | Parent Name | Field Status |
|-------|------------------------|--------------------------|--------------------------------------------------------------------|-------------|--------------|
| 1 | SetID | Text | Setid | | Active |
| 2 | Role Type | Choose One (with Rating) | Role Type | | Active |
| 3 | External ID | Text | Alphanumeric identifier used to match person to an external system | | Active |
| 4 | Source ID | Integer | Identifies the list or campaign that is the source of the name. | | Active |
| 5 | First Name | Text | First Name | | Active |
| 6 | Last Name | Text | Last Name | | Active |
| 7 | Middle Name | Text | Middle Name | | Active |
| 8 | Suffix | Text | Suffix (Jr., MD, etc.) | | Active |
| 9 | Salutation | Text | Salutation (Mr., Ms., etc.) | | Active |
| 10 | Social Security Number | Text | Social Security Number | | Active |
| 11 | Gender | Choose One | Gender | | Active |
| 12 | Email | Text | Email | | Active |
| 13 | Email Alternative | Text | Email Alternative | | Active |
| 14 | Email Domain | Text | Includes all characters after the @ symbol in an email address | | Active |

Note: Click a column heading to change the sort order of the column.

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Field Detail | Click to access the Profile Fields - Field Detail page where you defined the field. |
| Order | Displays the order in which profile fields appear when the profile is used. The order affects the display only, and users are free to select the fields in any order desired. |
| Name | Click the field name to access the profile field detail. |

| Field or Control | Description |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use Type | <p>Defines how to use the new fields. Values are:</p> <ul style="list-style-type: none"> • <i>Choose Many</i>: Defines a choice field that allows the respondent to select more than one response from a list of options. • <i>Choose One</i>: Defines a choice field that allows the respondent to select only one response from a list of options. • <i>Choose One (with rating)</i>: Defines a choice field that allows the respondent to select only one response from a list of options and assigns a numeric value to the choice. Also, specifies a numeric value associated with the choices. These values are to be used in the generated results. • <i>Date</i>: Defines an entry field for a date. • <i>Decimal</i>: Defines an entry field for numbers that allows decimal positions. An example is a currency entry. • <i>File</i>: Defines an entry field for uploaded files. • <i>Integer</i>: Defines an entry field for numbers that do not allow decimal positions. An example is a response to the question: How many children do you have? • <i>Map to Existing Field</i>: Defines a choice field that relies on a prompt table for response options. Prompt tables are useful when the response options are numerous. For example, you can use a prompt table field for state and country responses. Some common prompt tables (such as state and country) already exist within the system. If a prompt table does not exist, your system administrator will have to build it. <hr/> <p>Note: The <i>Map to Existing Field</i> field value is used for audience selection and data import only. PeopleSoft Online Marketing cannot use it in the creation of online documents. The <i>Map to Existing Field</i> field values cannot be included on profile tables with any other type of field. It is recommended that they reference a view rather than a system or profile table.</p> <hr/> <ul style="list-style-type: none"> • <i>Text</i>: Defines an entry field that allows the respondent to enter a free-form text response. You must specify a field length. The maximum field length must be less than 254 characters. <hr/> <p>Note: PeopleSoft Online Marketing users can use a document text field (created within a PeopleSoft Online Marketing document) to capture text entries that are greater than 254 characters. Refer to the PeopleSoft Online Marketing documentation for complete information.</p> <hr/> <ul style="list-style-type: none"> • <i>Text Block</i>: Defines an entry field that allows the respondent to enter a free-form text response. You must |

| Field or Control | Description |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | <p>specify a field length. The maximum field length must be less than 32,700 characters.</p> <ul style="list-style-type: none"> <i>Time</i>: Defines an entry field to receive a response in a time format. <i>Yes/No</i>: Defines a choice field for which the responses are either yes or no. |
| Parent Name | <p>Use this drop-down field to specify a relationship among field choices (for example, you could specify that a field named College is the parent of a Department field, and the Department field is in turn the parent of a field named Major). You can define three levels of hierarchy using this field; it appears only for fields of type <i>Choose One</i> and <i>Choose One with Rating</i>.</p> <hr/> <p>Note: This dynamic enumeration functionality applies only to Basic and Custom profile fields used with Online Marketing.</p> <hr/> |
| Field Status | <p>Displays the current status of the profile field and always depends on the status of the profile. Values are <i>In Design</i>, <i>Active</i>, and <i>Update</i>.</p> |

Profile Fields - Field Detail Page

Use the Profile Fields - Field Detail page (RA_ATTRIBUTE_DTL) to define a new profile field or edit an existing profile field.

Navigation:

Click the **Field Detail** link on the Profile Fields - Field Summary page.

This example illustrates the fields and controls on the Profile Fields - Field Detail page. You can find definitions for the fields and controls later on this page.

Profiles

Save Refresh | Add Profile | Clone Profile | View All Personalize

Group Type Individuals Profile Name People
Rows Per Contact One row Status Activated

Profile Profile Fields

Field Summary Field Detail

Field Detail Find | View All First 1 of 53 Last

Name SetID Field Status Active

Field Type Text
☐ Profile Question

Description Setid

Question Setid

Length 5

| Field or Control | Description |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name | Enter a name for the field. |
| Field Status | <p>Displays the current status of the profile field and always depends on the status of the profile. Values are <i>In Design</i>, <i>Active</i>, and <i>Update</i>.</p> <p>You can alter the profile field value when the field status is <i>In Design</i> or <i>Update</i>. When a profile is activated, all profile field statuses change to <i>Active</i>. To alter a profile field value, change the status of the profile to <i>Update</i>, then change the profile field status to <i>Update</i>.</p> |
| Use Type | The use type value that you selected when you added the new field appears as the default value. Until the profile is activated, select a new option to change the field type. |
| Profile Question | Select to make this field available for use in a web document or email blast. |
| Description | Enter a description of the field. The description appears on the Profile Fields - Field Summary page. |
| Question | If the profile field is specified as a profile question (the Profile Question check box is selected), enter a question that is designed to elicit a desired response. For example, if the value for the profile field is <i>Number of Pets</i> , your question might be: "How many pets are in your household?" |

The following fields appear only with certain use types.

| Field or Control | Description |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Order | Indicates the order in which you want the response options to appear. Change the order by changing the number in this field. Save the page to make the changes effective. |
| Choices | Enter the choice values for the profile field question. The value that you enter appears where the profile is used. |
| Rating | When <i>Choose One (with Rating)</i> is selected as the use type, enter a rating value for each option. Rating values are measured from the smallest numerical value to the highest. For example, a rating of 1 is less than a rating of 5. |

| Field or Control | Description |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Map to Field | When <i>Map to Existing Field</i> is selected as the use type, select the underlying prompt table. |
| | Note: If the prompt table is unknown or does not exist, this field can be left blank. If the prompt table does not exist, a system administrator must build it before the profile is activated. |
| Length | When <i>Text</i> or <i>Text Block</i> is selected as the use type, enter a text field length. The maximum field length for the <i>Text</i> use type must be less than 254 characters. The maximum field length for the <i>Text Block</i> use type is less than 32,700 characters. |

Modifying Active Profiles

You can make the following changes to activated profiles:

- Modify a profile field question.
- Change a profile field into a question field or change a question field into a non-question field.
- Add or inactivate field choices.
- Add a new profile field.

Note: After a profile is inserted into a PeopleSoft Online Marketing document, changes to the profile do not affect the document unless the profile is deleted from the document and then reinserted.

Profile changes are not required to be applied to all documents. In fact, situations will occur in which you will not want to change a document. For example, you can insert a profile into two or more documents if you intend to offer different choices to a particular question. By modifying the choices on the profile, you can insert the version with the appropriate choices into the different documents.

With the exception of adding a new profile field, you can easily modify active profiles without having to resubmit your profile request.

Making Changes That Do Not Require a New Request

Changes to existing fields do not affect the underlying profile table. Rather, these changes affect what is called the metadata.

To make changes that do not require a new request (changes to the metadata):

1. Change the status of the profile to *Update*.
2. On the Profile Fields - Field Summary page, click the field that you want to modify.

This enables you to access the Profile Fields - Field Detail page, where you must change the **Status** field to *Update*.

3. Make the change.

For example, to add a new choice to the *Choose Many* field value, click one of the **Add** buttons in the Choice column. To eliminate a choice, select the **Inactivate** check box beside the choice that you want to eliminate. You can also select or deselect the **Profile Question** check box to change whether a field appears as a question, or change the text of a question.

- Return to the Profile page, change the profile status to *Activated* and save the profile.

Adding a New Profile Field

Adding a new profile field requires a change to the profile table and can be completed by you or by the administrator, depending on your organization's requirements.

To add a new profile field to an existing profile:

- Change the status of the profile to *Update*.
- On the Profile Fields - Field Summary page, select the use type for the field that you want to add and click the **Add a New Field** button.
- Enter the field information and save the page.
- Return to the Profile page, change the profile status to *Requested*, and save the profile.

Profile - Marketing Center Page

Use the Profile - Marketing Center page (RA_PROFILE_MKTCTR) to secure a profile by Marketing Center.

Navigation:

Click the Marketing Center tab on the Profile page.

This example illustrates the fields and controls on the Profile - Marketing Center page. You can find definitions for the fields and controls later on this page.

| Field or Control | Description |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Marketing Center | Click the search icon and select a Marketing Center from the available list. Only those users or roles associated with the Marketing Center will be able to access the profile. |

| Field or Control | Description |
|-----------------------------|--------------------------------------------------------------------|
| Add Marketing Center | Click this button to add another Marketing Center row to the grid. |

When creating a profile, you can designate it as secure by selecting the Secured Profile check box on the Profile tab. When performing a search for profiles, only those secured profiles that a user has permission to access (that is, that they are authorized for at least one of the Marketing Centers associated with the profile) will be displayed as part of the search results. Profile definition functionality for documents and audiences will only display profiles that the user is authorized to access.

Note: Only custom profiles (that is, not AAF based profiles such as Case History and so forth) will be available for security. The People profile, because it should always be available for all users, does not include a Secured Profile check box.

Registering a Profile

When a profile request is set to a status of *Requested*, it becomes available for registration and activation. Registration is the process of mapping the profile fields to a profile table (record) and then making the profile available for use. Registration is a simple matter of linking the profile to the profile table and activating the profile.

Note: *Map to Existing Field* field value types rely on an underlying prompt table for field values. *Choose Many* field value types rely on a child table for field values.

If you have purchased PeopleSoft Online Marketing, the following characters cannot be used in profiles being used for Online Marketing documents: ampersand (&), apostrophe or single quote ('), double quote ("), greater than (>), less than (<), or period (.).

Critical Information for System Administrators

System administrators who are responsible for creating profile tables should become fully familiar with PeopleSoft Application Designer. To ensure proper interaction between PeopleSoft Marketing and Online Marketing, you must follow specific record and view design parameters.

See *PeopleTools: PeopleSoft Application Designer Developer's Guide*

This table lists information that applies to profile table fields that are created using PeopleSoft Application Designer:

| Profile Field Type | PeopleTools Field Type | Notes |
|---------------------------|-------------------------------|------------------------------------------------------------------------------------|
| <i>Choose Many</i> | NA | Separate child table is needed. No new fields are required for the profile record. |
| <i>Choose One</i> | Char (254) | |

| Profile Field Type | PeopleTools Field Type | Notes |
|-----------------------------------|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Choose One with Rating</i> | Number (18,0) | Must be signed. |
| <i>Date</i> | Date | |
| <i>Decimal</i> | Number (18,4) | Must be signed. |
| <i>File</i> | Char (254) | |
| <i>Integer</i> | Number (18,0) | Must be signed. |
| <i>Map Field Choice to Prompt</i> | Char (x) | Map Field Choice to Prompt fields cannot be included in profile tables with any other type of field. Oracle recommends that you create a view for this data rather than a profile table. The field that is referenced determines the PeopleTools field type. See the section related to building views in the PeopleSoft Application Designer documentation. |
| <i>Text</i> | Char (X) | X represents the desired field length as defined in the profile definition request . |
| <i>Text Block</i> | Long Character | |
| <i>Time</i> | Time | |
| <i>Yes/No</i> | Char (1) | |

The following information applies to profile tables (records) created using PeopleSoft Application Designer:

- *One Row* profile records require the BO_ID field (as a key and search key field) and all other fields as defined in the profile request (as non-keys). At the end of the record, include the RB_AUDIT_SBR subrecord.
- *Many Rows* profile records require the BO_ID and RA_ATTRIB_SEQ fields (as key and search key fields) and all other fields as defined in the profile request (as non-keys).

At the end of the record, include the RB_AUDIT_SBR subrecord. Also, you must create a new index. When you create the index, add comments and make sure that the clustered and unique check boxes are deselected. Add the BO_ID field to the index.

- A record that includes a *Choose Many* use type must also have a child record to contain the choices that are selected by the respondent.

The child record requires the BO_ID and RA_ATTRIB_SEQ fields (as key fields), CHOICE (as a non-key field), and the RB_AUDIT_SBR subrecord. These are the only fields you should have on your *Choose Many* child record. Also, you must create a new index. When you create the index, add comments and ensure that the clustered and unique check boxes are deselected. Add the BO_ID field to the index.

A record that includes a *Text Block* use type must also have a child record to contain the choices that are selected by the respondent.

The child record requires the BO_ID and RA_ATTRIB_SEQ fields (as key fields), LONG_TEXT (as a non-key field), and the RB_AUDIT_SBR subrecord. These are the only fields you should have on your *Text Block* child record. Also, you must create a new index. When you create the index, add comments and ensure that the clustered and unique check boxes are deselected. Add the BO_ID field to the index.

Profile records must follow a standard naming convention (<recprefix>_<profileName>) that uses the record prefix that is designated on the Profile Setup page. For example, if the record prefix is OMP, and your profile record relates to pets, you might use the name OMP_PETS.

Note: Unless the system administrator decides to create a custom tablespace for profile tables, use the RALARGE tablespace.

Pages Used to Register a Profile

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------------------------------------|------------------------|----------------------------------------------------------|
| <u>Profiles Page</u> | RA_PROFILE_DTL | View the profiles that are registered. |
| Profile Registration - Profile Fields - Field Summary | RA_ATTRIBUTE_SUMM | Enter or view summary information about profile fields. |
| Profile Registration - Profile Fields - Field Detail | RA_ATTRIBUTE_DTL | Enter or view detailed information about profile fields. |


Profiles Page

Use the Profiles page (RA_PROFILE_DTL) to view the profiles that are registered.

Navigation:

Set Up CRM > Common Definitions > Profile Management > Profile Registration > Profiles

This example illustrates the fields and controls on the Profiles page. You can find definitions for the fields and controls later on this page.

| Profiles | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|------------------|----------------------------|----------------|
| *Profile Category Individuals | | | | |
| <div>Individuals</div> <div>Personalize Find View All  First 1-25 of 28 Last</div> | | | | |
| Profile Name | Created By | Rows per contact | Long Description | Profile Status |
| People | System | One row | Individuals:People Profile | Activated |
| Sales Leads | System | Many rows | Sales Leads - Individuals | Activated |
| CS-ADM Academic History | User | Many rows | CS-ADM Academic History | Requested |
| CS-ADM Academic Interests | User | Many rows | CS-ADM Academic Interests | Requested |
| CS-ADM Applicant Data | User | Many rows | CS-ADM Applicant Data | Requested |
| CS-ADM Applicant Plan | User | Many rows | CS-ADM Applicant Plan | Requested |
| CS-ADM Applicant Program | User | Many rows | CS-ADM Applicant Program | Requested |
| CS-ADM Applicant Recruiter | User | Many rows | CS-ADM Applicant Recruiter | Requested |
| CS-ADM Applicant Sub-Plan | User | Many rows | CS-ADM Applicant Sub-Plan | Requested |
| CS-ADM Extracur Activity | User | Many rows | CS-ADM Extracur Activity | Requested |
| CS-ADM Service Indicators | User | Many rows | CS-ADM Service Indicators | Requested |
| CS-Constituents | User | Many rows | CS-Constituents | Requested |
| CS-PRS Prospect Recruiters | User | Many rows | CS-PRS Prospect Recruiters | Requested |
| CS-Person | User | One row | CS-Person | Requested |
| CS-Person Ethnicity | User | Many rows | CS-Person Ethnicity | Requested |

This page enables you to view all the profiles that are defined to the system. Click a profile name to view or modify profile detail.

Profile Registration - Profile Page

Use the Profile Registration - Profile Fields - Field Summary page (RA_ATTRIBUTE_SUMM) to enter or view summary information about profile fields.

Navigation:

- Click a **Profile Name** link on the Profile page.
- Click the **Field Summary** link on the Profile Fields - Field Detail page.

This example illustrates the fields and controls on the Profile Registration - Profile page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Profile Registration' interface. At the top, there are buttons for 'Save', 'Refresh', and 'View All', along with a 'Personalize' link. Below these, the 'Group Type' is set to 'Individuals', 'Profile Name' is 'People', and 'Status' is 'Activated'. The 'Rows Per Contact' is set to 'One row'. The 'Profile' tab is selected, showing a 'Profile' section with 'Category' as 'Individuals', 'Profile Name' as 'People', and 'Description' as 'Individuals: People Profile'. There are two radio buttons: 'Create Profile Automatically' (selected) and 'Create/Map Profile Manually'. The 'Record Name' is 'BO_BASIC_IND'.

| Field or Control | Description |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Status | <p>Select <i>Activated</i> when the profile registration is complete. This makes the profile available for use.</p> <p>Select <i>Rejected</i> when the profile request is unacceptable and must be redefined or discarded.</p> <p>Select <i>Requested</i> when the profile has not been registered and activated.</p> <hr/> <p>Note: If the profile was automatically created, and reactivation requires changes to the record (table), the profile status is changed to <i>Activating</i> until the necessary processing is complete.</p> |
| Create Profile Automatically | Select to generate the profile record to use to store the profile information automatically. |
| Create/Map profile Manually | <p>Select to map the profile and the record where the profile information is stored manually.</p> <p>The record must be created in the application designer in advance. If this option is selected, specify the record in the Record Name field.</p> |
| Record Name | Select the record (table) that was created for this profile. |

Profile Registration - Profile Fields Page

Use the Profile Registration - Profile Fields - Field Detail page (RA_ATTRIBUTE_DTL) to enter or view detailed information about profile fields.

Navigation:

Click the **Field Detail** link on the Profile Fields - Field Summary page.

Note: The Profile Fields pages of profiles that were automatically created (and thus, automatically mapped) do not display the **Record Name** and **Field Name** columns on the **Profile Fields** grid.

This example illustrates the fields and controls on the Profile Registration - Profile Fields page. You can find definitions for the fields and controls later on this page.

Profile Registration

Save Refresh | View All Personalize

Group Type: Individuals Profile Name: People
Rows Per Contact: One row Status: Activated

Profile Profile Fields

Field Summary Field Detail

Profile Fields Personalize Find View All First 1-40 of 53 Last

| Order | Name | Record Name | Field Name | Use Type | Field Status |
|-------|------------------------|--------------|------------------|--------------------------|--------------|
| 1 | SetID | BO_BASIC_IND | SETID | Text | Active |
| 2 | Role Type | BO_BASIC_IND | ROLE_TYPE_ID | Choose One (with Rating) | Active |
| 3 | External ID | BO_BASIC_IND | EXTERNAL_LIST_ID | Text | Active |
| 4 | Source ID | BO_BASIC_IND | SOURCE_SYSID | Integer | Active |
| 5 | First Name | BO_BASIC_IND | FIRST_NAME | Text | Active |
| 6 | Last Name | BO_BASIC_IND | LAST_NAME | Text | Active |
| 7 | Middle Name | BO_BASIC_IND | MIDDLE_NAME | Text | Active |
| 8 | Suffix | BO_BASIC_IND | NAME_SUFFIX | Text | Active |
| 9 | Salutation | BO_BASIC_IND | NAME_PREFIX | Text | Active |
| 10 | Social Security Number | BO_BASIC_IND | SSN | Text | Active |
| 11 | Gender | BO_BASIC_IND | SEX | Choose One | Active |
| 12 | Email | BO_BASIC_IND | EMAIL_ADDR | Text | Active |
| 13 | Email Alternative | BO_BASIC_IND | EMAIL_ADDR_ALT | Text | Active |
| 14 | Email Domain | BO_BASIC_IND | EMAIL_DOMAIN | Text | Active |
| 15 | Address1 | BO_BASIC_IND | ADDRESS1 | Text | Active |

| Field or Control | Description |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name | Displays the profile field name. |
| Record Name | Confirm the profile table record name. If the profile field is a <i>Choose Many</i> or <i>Text Block</i> use type, select the correct child record. If the profile field is a <i>Map to Existing Field</i> use type, confirm that the Map to Field field on the Profile Fields - Field Detail page is set to the appropriate prompt table record name. |
| Field Name | Select the profile record field name that corresponds to the profile field name. |
| Delete | Click to remove a profile field. Note: Fields cannot be deleted from an activated profile. After a profile is activated, you can update field details, but the changes affect profile use only from the time of the change forward. |

Completing the Activation Process

When the profile fields are matched to the profile table (registered), return to the Profile Registration - Profile page, set the profile status to *Activated*, and save the page to activate the profile.

Setting Up Profile Groups

This topic discusses how to set up profile groups.

Pages Used to Set Up Profile Groups

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-----------------------------------------------------------|-------------------------------|---------------------------------------------------------------------------------------------------------------------|
| <u>Define Profile Group Page</u> | RA_PRFL_DEF_PG1 | Define profile groups. |
| <u>Define Profile Group - Add Profile Field Page</u> | RA_PRFL_FLD_SEC | Select profile fields to add to a profile group. |
| <u>Assign Profile Group Display Page</u> | RA_CMPT_PRFL_PG | Assign profile groups to a CDM component. |
| <u>Assign Profile Group Display - Edit Condition Page</u> | RA_CND_BLD_PG | Specify the conditions under which the profile group fields appear on the More Info or Summary page or leave blank. |

Define Profile Group Page

Use the Define Profile Group page (RA_PRFL_DEF_PG1) to define profile groups.

Navigation:

Set Up CRM > Common Definitions > Profile Management > Profile Groups > Define Profile Group

This example illustrates the fields and controls on the Define Profile Group page. You can find definitions for the fields and controls later on this page.

| Specify Profile Group Information | | | |
|-----------------------------------|----------------|-----------|-------------|
| *Group Name | Customer Value | *Category | Individuals |
| Description | Customer Value | | |

Column One Contents

No Profile Fields have been Selected.

Add Profile Field

Column Two Contents

No Profile Fields have been Selected.

Add Profile Field

| Audit History | | | |
|---------------|-----------------------|-------------|--------------|
| Created | 04/05/2004 3:15PM PDT | By JDIAMOND | Jack Diamond |
| Modified | 04/05/2004 3:15PM PDT | By JDIAMOND | Jack Diamond |

Note: You can select only profile fields in activated profiles for profile groups.

You cannot add profile fields from the basic tables or many row profiles to profile groups.

Define Profile Group - Add Profile Field Page

Use the Define Profile Group - Add Profile Field page (RA_PRFL_FLD_SEC) to select profile fields to add to a profile group.

Navigation:

Click the **Add Profile Field** button on the Define Profile Group page.

This example illustrates the fields and controls on the Define Profile Group - Add Profile Field page. You can find definitions for the fields and controls later on this page.

Define Profile Group

Add Profile Field

Profile Group Name Customer Value

Browse Profiles

First 1-2 of 2 Last

Individuals

Select Profile Fields

No Profile is Selected.

☐ Check All / Clear All

Apply Cancel

Select a profile to view the fields that it contains. Select one or more fields and click **Apply**. You must apply the fields to the profile before saving the profile.

Assign Profile Group Display Page

Use the Assign Profile Group Display page (RA_CMPT_PRFL_PG) to assign profile groups to a CDM component.

Navigation:

Set Up CRM > Common Definitions > Profile Management > Profile Groups > Assign Profile Group Display

This example illustrates the fields and controls on the Assign Profile Group Display page. You can find definitions for the fields and controls later on this page.

Assign Profile Group Display

Component

Company

Profile Groups for Summary Page

Customize




Find

View All

First

1 of 1

Last

| *Sequence | Purchasing History | Read-Only | Display Condition | Edit Condition | Clear Condition | |
|-----------|--------------------|-------------------------------------|-------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1 | Purchasing History | <input checked="" type="checkbox"/> | |  |  |  |

Profile Group Name

Purchasing History

Add

Profile Groups for More Info Page


No Profile Groups have been Added.

Profile Group Name

Add

Save

Note: The fields in the **Profile Groups for Summary Page** region are available for the Company component only.

| Field or Control | Description |
|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| Add | Click to add a profile group to the component. |
|  | Click the Edit Condition button to define the conditions under which the profile appears. |

Assign Profile Group Display - Edit Condition Page

Use the Assign Profile Group Display - Edit Condition page (RA_CND_BLD_PG) to specify the conditions under which the profile group fields appear on the More Info or Summary page or leave blank.

Navigation:

Click the **Edit Condition** button next to a profile group on the Assign Profile Group Display - Assign Profile Group Display page.

This example illustrates the fields and controls on the Assign Profile Group Display - Edit Condition page. You can find definitions for the fields and controls later on this page.

Assign Profile Group Display

Edit Condition

Component

Company

Profile Group Name

Purchasing History

[Switch to Advanced Mode](#)

Conditions

First

1 of 1

Last

| Term | Operator | Value |
|-----------------------------|----------|-------|
| Select Term | | |

+

-

Done

Cancel

Click a condition that is listed in the **Conditions** region to view and edit the condition.

| Field or Control | Description |
|-------------------------|--------------------------------------|
| Switch to Advanced Mode | Click to specify complex conditions. |

Note: Terms are programmatically created as profile fields are activated, except for the type *Choose Many*. You can use most profile terms anywhere AAF is used.

Related Links

- “Understanding AAF” (Automation and Configuration Tools)
- “Understanding the Use of Active Analytics Framework in CRM” (Automation and Configuration Tools)

Viewing and Updating Profile Data

This topic discusses how to view and update profile data information.

Pages Used to View and Update Profile Data

| Page Name | Definition Name | Usage |
|-------------------------------------------|--------------------|-----------------------------------------|
| Company - More Info Person - More Info | RD_PROFILE | View and update profile information. |
| Company - Summary | RD_COMPANY_SUMMARY | View profile information for a company. |

More Info Page

Use the More Info page (RD_PROFILE) to view and update profile information.

Navigation:

- **Customers CRM > Search Company > Company > More Info**
- **Customers CRM > Search Person > Person > More Info**

Inserting and Updating Rows in Profiles

This topic describes how to insert and update rows in single row and multi row profiles. The individuals whose profiles are updated are based on the audience that is selected. You can view a profile change history by opening a completed profile update.

Only user created (custom) profiles in the Individual folder with a status of *Activated* that the current user is authorized to access can be updated. You will only be able to view a preview row count with static audiences.

Page Used to Insert and Update Rows in Profiles

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|------------------------------------|-------------------------------|--------------------------------------------------------------|
| <u>Manage Profile Updates Page</u> | RA_PROF_UPD | Insert and update rows in single row and multi row profiles. |

Manage Profile Updates Page

Use the Manage Profile Updates page (RA_PROF_UPD) to insert and update rows in single row and multi row profiles.

Navigation:

Marketing > Manage Profile Updates

This example illustrates the fields and controls on the Manage Profile Updates page. You can find definitions for the fields and controls later on this page.

Manage Profile Updates

Save | Search | Previous | Next | Add | Personalize

Profile Update Name: Fall 2010 Events Status: In Design
 Description: Created Date/Time: 09/10/2009 2:51PM

*Profile Update Name:
 Description:
 Status: In Design
 *Profile: Brochure Status for Fall 2010 Events
 *Audience:

Profile Field Values Find First 1-2 of 2 Last

| Profile Field Name | Operator | Value |
|------------------------------------------------|----------|----------------------------------------------|
| Set <input type="text" value="Brochure Sent"/> | equal to | <input type="text" value="Yes"/> |
| Set <input type="text" value="Event Id"/> | equal to | <input type="text" value="EVT000000010006"/> |

Add Profile Field Value

Execute Profile Updates

☐ Preview Count
☐ Date Time
☒ Now

Generation Log 2009-09-10 14:51:48 -- 0 rows would be updated, 28 rows would be inserted, 28 person profiles would be updated

Execute

| Field or Control | Description |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Profile Update Name | Enter a descriptive name for the profile update. |
| Description | Enter a description for the profile update. |
| Status | The current profile status. |
| Profile | Select from a list of the current custom profiles. The prompt displays only profiles in the Individual category with the status of <i>Activated</i> ; the People profile and any AAF or Organization profiles are not displayed. Further, only profiles that the current user is authorized to access are displayed in the profile prompt. |
| Audience | Only authorized audiences are displayed in the Audience prompt. Additionally, you can only transfer to the audience (using the transfer icon next to the prompt) if the user is authorized. If the user is not authorized, then an error message is displayed. |

Single Row Profile Updates

The following items refer to both single row and multi row profile updates.

| Field or Control | Description |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Profile Field Values | <p>Select the profile field, then enter the value to which you want to change it. If a row currently exists for a person, then that row will be updated; if a row does not currently exist, then a new row with the field values set will be inserted.</p> <p>If you only want to update existing rows, you can select an audience where single rows currently exist (so the processing will be updated only upon execution).</p> |
| Add Profile Field Value | Click this button to add another profile field value row. |

Multi Row Profile Updates

When the selected profile is a multi row profile, an additional scroll area appears on the Manage Profile Updates page, allowing the entry of selection criteria (that is, allowing users to determine which multi-row profile rows will be inserted or updated).

This example illustrates the fields and controls on the Manage Profile Updates page with multi-row profile options. You can find definitions for the fields and controls later on this page.

Manage Profile Updates

Save | Search | Next | Add | Personalize

Profile Update Name Fall 2010 Event Brochure Sent **Status** Completed
Description **Created Date/Time** 09/10/2009 3:09PM

Profile Update Name Fall 2010 Event Brochure Sent
Description
Status Completed
Profile Brochure Fall 2010 Brochure Status for Fall 2010 Events
Audience Fall 2010 Event : Inv

Profile Field Values Find First 1-3 of 3 Last

| | Profile Field Name | Operator | Value |
|-----|--------------------|----------|-----------------|
| Set | Brochure Sent | equal to | Yes |
| Set | Event Id | equal to | EVT000000010006 |
| Set | Business Unit | equal to | PSUNV |

Selection Criteria Find First 1 of 1 Last

| | Profile Field Name | Operator | Value |
|--|--------------------|----------|-------|
| | | | |

Row Not Found Action

☒ Insert new row if existing row not found
☐ No action if existing row not found

Generation Log

2009-09-10 15:09:33 -- 0 rows updated, 28 rows inserted, 28 person profiles updated
2009-09-10 15:09:08 -- 0 rows would be updated, 28 rows would be inserted, 28 person profiles would be updated

| Field or Control | Description |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Selection Criteria | <p>Select the profile field and operator and enter the value to which you want to change it. The first and last fields in this group box are open and closed brackets, necessary only if you want to group criteria. If you include an open bracket, you must include a corresponding closed bracket.</p> <p>For each selection criterion after the first, an AND/OR/WITH field appears. This field is required only if you include two or more selection criteria, and does not appear otherwise.</p> |
| Row Not Found Action | <p>If you select <i>Insert new row if existing row not found</i> and no matching existing row is found, then the values in the selection criteria and in the Profile field values sections will be used to insert a new row. Values in the selection criteria will be eligible for inserts only you have used the operators 'is equal to' or 'is equal to current date' while setting selection criteria.</p> <p>If you select <i>No action if existing row not found</i>, then no new rows will be inserted if no matching existing row is found.</p> <p>Existing rows are updated regardless of the value selected for this field.</p> |

Executing the Profile Update

Use the Execute Profile Updates section to specify the validations you want the system to perform when you click the **Execute** button. In all cases, the following validations occur:

- The Profile, Profile Description and Audience fields must not be blank.
- At least one Profile Field and Value must be entered in the Profile Field Values grid.

| Field or Control | Description |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Execute | Click this button to perform the specified profile update. |
| Preview Count | <p>If this option is selected, a row count is displayed showing how many rows will be updated if the update were performed, but the profile table is not actually updated. A count of the total number of rows that would be updated, the total number of rows that would be inserted and the total number of users whose profile row(s) would be changed is displayed in the Generation Log field.</p> <p>You can only use this option for static audiences.</p> |

| Field or Control | Description |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Date, Time | Enter a date and time to submit the update. If this option is selected and the Execute button is clicked, then the job status is displayed and the user can choose to view more details from the Process Monitor. |
| Now | Select this option to submit the job immediately. The status details are shown and the Generation Log is updated with the actual details (number of rows updated, number inserted, and number of Person profiles updated or inserted) after the job is completed. |

State Changes for Profile Updater

The following table shows the states through which a profile can progress when an update is performed.

| From State | To State | State Processing |
|-------------------|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| In Design | Queued | This status change occurs automatically when you click the Execute button to process either Now or for a future date. |
| Queued | Processing | The update is in process. |
| Processing | Completed | This status change occurs by the Application Engine Profile Updater process when the update completes successfully. When the profile update is in this state, no changes are allowed to the profile update (page is display only). |
| Processing | Failed | This status change occurs by the Application Engine Profile Updater process when the update completes but is not successful. When the profile update is in this state, the only change that the user can make is to change Status back to <i>In Design</i> . |

| <i>From State</i> | <i>To State</i> | <i>State Processing</i> |
|--------------------------|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Processing | Aborted | This status change occurs by the Application Engine Profile Updater process when the process ends unexpectedly. When the profile update is in this state, only change that can be made by the user is to change Status back to <i>In Design</i> . |
| Completed | None | When the profile update is in this state, no changes are allowed to it (page is display only). |
| Failed | In Design | This status change can be manually made by the user. It is required before the process can be run again. |
| Aborted | In Design | This status change can be manually made by the user. It is required before the process can be run again. |

Working with the Relationship Viewer

Understanding the Relationship Viewer

These topics discuss:

- Purpose of the relationship viewer.
- Types of relationships.
- Implicit and explicit relationships.
- Roles in the relationship viewer.
- PeopleSoft Customer Relationship Management (PeopleSoft CRM) sample relationship views.

Purpose of the Relationship Viewer

The relationship viewer enables you to view, maintain, and add relationships for a specified business object, such as a company, site, consumer, contact, or ad hoc business object. You can configure relationship views that determine the relationships that appear in the relationship viewer. The relationship viewer is available as a standalone component, or you can access it from within the Company, Person, Site, Ad Hoc Business Object, and 360-Degree View components.

Types of Relationships

You can show four kinds of relationships in the relationship viewer: direct, indirect, peer-to-peer, and hierarchical. A *direct relationship* is established between two business objects of any type. For example, a direct relationship between a person and a company is established when you define the person as an employee of the company.

An *indirect relationship* is implied between two business objects that have the same type of relationship with a third business object. For example, even though two workers at a company work in different departments and are not directly related, they are indirectly related because each one has an employment relationship with the same company.

A *peer-to-peer relationship* is set up between business objects of the same type that share a direct relationship to a third business object of a different type. A peer-to-peer relationship formalizes an existing indirect relationship. Typically, you establish peer-to-peer relationships for the subset of indirect relationships that provide information that is relevant to the business objectives. For example, you might establish peer-to-peer relationships among the players on a company softball team to formalize the indirect relationship that these players already have to each other.

You can monitor relevant peer-to-peer relationships instead of viewing the entire set of indirect relationships. To continue the softball example, if the relationship viewer is configured to show direct relationships and peer-to-peer relationships, the relationship view shows that each player has a direct

relationship to the company and a peer-to-peer relationship to the other players on the team. If you do not establish the peer-to-peer relationship among team members, you can only view all indirect relationships between each employee of the company, and you cannot identify which employees have a team member relationship to each other.

Hierarchical relationships show parent-child relationships between business objects. Relationship hierarchies are graphically represented with a tree format in the relationship viewer. Parent-child relationships are defined by the relationship type and the designation of business object 1 and 2 in the relationship, where business object 1 is interpreted as the parent and business object 2, the child.

The tree format view is not limited to true hierarchical relationships. You can also present peer-to-peer relationships in a tree format by designating one of the two roles as the parent when you set up the relationship view.

Note: Using the multi-company relationship view through relationship viewer, a parent company/company relationship can only be established with an existing company.

Implicit and Explicit Relationships

From all of the components that include the relationship viewer, you can view relationships that are created both implicitly and explicitly. Implicit relationships are automatically recorded to capture a relationship that is implied by a specified transaction. For example, when a company is associated with a contact by using the Company component, the system automatically records a relationship between the company and the contact: Contact - Company, relationship type ID 10. PeopleSoft CRM provides system data, including role types and relationship types, for all implicit relationships. You can manually create or update implicit relationships by using the relationship viewer.

You can manually create explicit relationships by using the relationship viewer that is available in the Company, Consumer, Representative, Site, and ad hoc Business Object components. To create these relationships, you must set up the appropriate control values and configure a relationship view to recognize this type of relationship.

Roles in the Relationship Viewer

In PeopleSoft CRM, each business object might have more than one role. Roles determine which default views appear in the relationship viewer.

For example, Jim Smith has both the Contact and Consumer roles and he is currently in focus on the relationship viewer. The Contact role has a priority of 1, and the Consumer role has a priority of 2. In this case, the default relationship views that appear for Jim Smith in the relationship viewer are those views that are defined for the Contact role.

PeopleSoft CRM Sample Relationship Views

The sample data that accompanies the PeopleSoft CRM installation CD contains these relationship views that you can modify to meet the business requirements:

| <i>Relationship View</i> | <i>Configuration</i> |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| CONSUMER CONTACTS | Level 1: (Role) Individual Consumer Level 2: (Role) Contact Relationships: 1. Primary Contact ↔ Consumer 2. Contact ↔ Consumer |
| CONTACT VIEW | Level 1: (Role) Company Level 2: (Role) Contact Relationships: 1. Primary Contact ↔ Company 2. Contact ↔ Company |
| SITE CONTACTS | Level 1: (Role) Site Level 2: (Role) Contact Relationships: 1. Primary Contact ↔ Site 2. Contact ↔ Site |
| SITE VIEW | Level 1: (Role) Company Level 2: (Role) Site Relationships: Company ↔ Site |

Configuring Relationship Views

To configure relationship views, use the Configure Relationship Views (BO_RELVW_CONFIG) component.

This topic discusses how to configure relationship views.

Page Used to Configure Relationship Views

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---------------------------------------------------|------------------------|---------------------------------------------------------------------------------------------------------------------------|
| Configure Relationship Views Page | BO_REL_VWCFG | Create relationship views. The relationship view defines the tree that appears in a pane of the Relationship Viewer page. |

Configure Relationship Views Page

Use the Configure Relationship Views page (BO_REL_VWCFG) to create relationship views. The relationship view defines the tree that appears in a pane of the Relationship Viewer page.

Navigation:

Set Up CRM > Common Definitions > Customer > Configure Relationship Views > Configure Relationship Views

This example illustrates the fields and controls on the Configure Relationship Views page. You can find definitions for the fields and controls later on this page.

| <i>Field or Control</i> | <i>Description</i> |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| Maximum Rows | Enter the maximum number of relationships to display on the Relationship Viewer page for the primary focus business object. |

Levels/Roles

The fields that are in the **Levels/Roles** page region enable you to define the structure of the relationship tree.

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Level | Enter the level at which this role and relationship pair appears in the tree. If you enter a level of <i>1</i> , the system removes the Relationships group box from the page and it hides the Parent field. |
| Parent | Select the parent node for which this role and relationship pair appears in the tree. |
| Role | Select the role for the node that appears in the tree. |
| Maximum Rows | Enter the maximum number of relationships to show for this node of the tree on the Relationship Viewer page for the primary focus business object. |
| Enforce Hierarchy | Select to have business objects that have the same role and are related in a parent-child relationship appear in the proper hierarchy when the user views <i>Multi Company</i> or <i>Customer Hierarchy</i> relationships. |

Folder Label

Use the options that are in the **Folder Label** group box to control how the relationship tree appears.

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Role Type | Select to use Role Type as the folder label on the tree. |
| Custom Name | Select to use a custom name as the folder label on the tree. |
| None | Select to have no label appear for the folder on the tree. Use none if you want to suppress adding new relationships of this type. |

Relationships

This page region appears only if you select a level other than 1.

| Field or Control | Description |
|--------------------------|---------------------------------------------|
| Relationship Type | Select the relationship type for this role. |

Search Criteria/Quick Create Template

Specify the business object (BO) search criteria or quick create template that is used when you add new relationships in the relationship viewer tree. If you specify a quick create template, the system uses this template and has priority over the BO search criteria. If you do not specify a quick create template, then the system uses the search criteria.

| Field or Control | Description |
|-------------------------|--------------------|
| Market | Select the market. |

| Field or Control | Description |
|---------------------------|-------------------------------|
| BO Search Criteria | Select a BO search criterion. |

| Field or Control | Description |
|------------------------------|---------------------------------|
| Quick Create Template | Select a quick create template. |

Note: Using Quick Creation for a new company while establishing a multi-company relationship through relationship viewer is not supported.

Configuring the Relationship Viewer

To configure the relationship viewer, use the Role Priority (BO_REL_PRIOROPT) component.

These topics discuss how to:

- Define Relationship Viewer page defaults.
- Prioritize roles for the relationship viewer.

Pages Used to Configure the Relationship Viewer

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---------------------------------------------|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Role Type - Default Views Page</u> | BO_REL_ROLEDFLT | Specify the default views that appear in both sections of the Relationship Viewer page and specify the views that are to appear in the Select View list on the Relationship Viewer page. You can use a relationship view in more than one market. |
| <u>Role Priority - Role Priorities Page</u> | BO_REL_ROLEPRIORITY | Prioritize roles to determine the default relationship views that appear in the relationship viewer. |

Role Type - Default Views Page

Use the Role Type - Default Views page (BO_REL_ROLEDFLT) to specify the default views that appear in both sections of the Relationship Viewer page and specify the views that are to appear in the Select View list on the Relationship Viewer page.

You can use a relationship view in more than one market.

Navigation:

Set Up CRM > Common Definitions > Customer > Role Type > Default Views

This example illustrates the fields and controls on the Role Type - Default Views page. You can find definitions for the fields and controls later on this page.

Relationship Viewer Page Defaults

Role Type ID

Role Company

Page Defaults
Personalize | View All |

First 1-22 of 22 Last

| Market | Relationship View Name | Default Pane 1 | Default Pane 2 | Pane 1 | Pane 2 | All Panes |
|--------------------|------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Communications | BILL_ACCT_ADMIN | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Communications | COMPANY HIERARCHY | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Communications | CONTACT VIEW | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Communications | CUST_HIERARCHY | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Energy | BILL_ACCT_ADMIN | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Energy | COMPANY HIERARCHY | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Energy | CONTACT VIEW | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Energy | MULTI-COMPANY VIEW | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Energy | PARTNER | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Energy | SITE VIEW | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Financial Services | COMPANY HIERARCHY | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Financial Services | CONTACT VIEW | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Financial Services | MULTI-COMPANY VIEW | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Financial Services | PARTNER | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Financial Services | SITE VIEW | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

| Field or Control | Description |
|-------------------------------|---------------------------------------------------------------------------------|
| Relationship View Name | Select the relationship view that you want to associate with the role. |
| Default Pane 1 | Select the default view that appears in Pane 1 of the Relationship Viewer page. |
| Default Pane 2 | Select the default view that appears in Pane 2 of the Relationship Viewer page. |
| Pane 1 | Select the views that you want as selection criteria for Pane 1. |
| Pane 2 | Select the views that you want as selection criteria for Pane 2. |
| All Panes | Select the views that you want as selection criteria in both Pane 1 and Pane 2. |

Role Priority - Role Priorities Page

Use the Role Priority - Role Priorities page (BO_REL_ROLEPRIORITY) to prioritize roles to determine the default relationship views that appear in the relationship viewer.

Navigation:

Set Up CRM > Common Definitions > Customer > Role Priority > Role Priorities

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Priority | Enter a number in this field next to each role that you want to prioritize. The system uses this field to determine priority. Priority works from lowest number to highest number. |

Viewing and Maintaining Relationships and Roles

These topics discuss how to:

- View and maintain relationships.
- View and maintain roles.

Pages Used to View and Maintain Relationships and Roles

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---------------------------------|-------------------------------|--------------------------------------------------------------------------|
| <u>Relationship Viewer Page</u> | BO_REL_VIEW | View and maintain current relationships for a specified business object. |
| Company - Relationships | RD_COMPANY_REL | View and maintain current relationships for a specified business object. |
| Consumer - Relationships | RD_PERSON_REL | View and maintain current relationships for a specified business object. |
| Contact - Relationships | RD_PERSON_REL | View and maintain current relationships for a specified business object. |
| Site - Relationships | RD_SITE_REL_2 | View and maintain current relationships for a specified business object. |
| Business Object - Relationships | BO_REL | View and maintain current relationships for a specified business object. |

| Page Name | Definition Name | Usage |
|---------------------------------------------|------------------------|------------------------------------------------------------------------------------------|
| 360-Degree View - Relationship Viewer | RB_TD_REL_VIEWER | View and maintain current relationships for a specified business object. |
| Create New <relationship> of <object> | BO_REL_VIEW_3 | Add a new relationship. |
| Relationship Viewer - Update <relationship> | BO_REL_VIEW_2 | Update the relationship. You can modify the start date or end date for the relationship. |
| <u>Maintain Roles Page</u> | MAINTAIN_ROLE_SEC | Maintain roles for a specified business object. |
| 360-Degree View | RB_TD_AGENT_VIEW | Access the 360-degree view of the specified business object. |

Relationship Viewer Page

Use the Relationship Viewer page (BO_REL_VIEW) to view and maintain current relationships for a specified business object.

Navigation:

Customers CRM > Relationship Viewer

This example illustrates the fields and controls on the Relationship Viewer page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Relationship Viewer' page for the 'MMA Property Management Group'. At the top, there is a search bar and navigation links for 'Next' and 'Previous'. Below this, the 'Name' field is set to 'MMA Property Management Group'. There are two main sections: 'Left View' and 'Right View'. The 'Left View' is currently set to 'Contact View' and shows a list of contacts: Alan Bailey, Barb Johnson, Bill Hauser, Elsie Tripper, Fred Albright, and Teri Thomas. The 'Right View' is set to 'Site View' and shows a list of sites: Minneapolis, Redwood Falls, Roseville, and Saint Paul. Both views include an 'Add New' button and a '360' icon next to each item. There are also dropdown menus for 'Role' (set to 'Company') and 'Maintain Roles'.

| Field or Control | Description |
|-------------------------|-----------------------------------------------------------|
| Role | Select the role for which you want to view relationships. |

| Field or Control | Description |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Select View | <p>Select a relationship view that you want to appear in the corresponding pane of the page.</p> <p>The views that appear as selection criteria for this field are defined on the Role Type - Default Views page.</p> <p>See Configuring Relationship Views.</p> |
| Maintain Roles | Click to access the Maintain Roles page for the specified business object. |


View Detail


The **View Detail** page regions show the relationships that are associated with the business object that is selected in a tree format. The default relationship view trees are based on the business object's roles and role priorities.

Click any link that is in the tree to view detail information for that business object. A PeopleSoft CRM Business Object Relationship Model page for the business object type appears in a new browser. For example, if you click a contact link, the Contact - Contact page appears. If you click a site link, the Site - Site page appears.

The icons that appear to the left of the business object detail vary by business object. If no icon is specified for the business object, then a leaf icon appears in the relationship viewer for that business object.

See [Role Type Page](#).

| Field or Control | Description |
|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add New <relationship> | <p>Click to add a new relationship.</p> <p>The Add New Relationship link appears at the beginning of every node that you configure with a folder label when you configure the relationship view.</p> <p>If the node is configured with a quick create template, the quick create page appears when the user clicks this link.</p> <p>See Configure Relationship Views Page.</p> <p>If the node is configured with a BO search criteria, the Add New <relationship> page appears.</p> <p>See Viewing and Maintaining Relationships and Roles.</p> |
|  | Click to update the relationship. |

| Field or Control | Description |
|-----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <p>Click to display the 360-Degree View for the business object in a new browser window.</p> <hr/> <p>Note: The 360-Degree button only appears on the tree detail for role types that are supported by the 360-Degree View. See role type category 43 (360 Transfer Roles) for the list of valid role types.</p> <hr/> |

Maintain Roles Page

Use the Maintain Roles page (MAINTAIN_ROLE_SEC) to maintain roles for a specified business object.

Navigation:

Click the **Maintain Roles** link on the Relationship Viewer page or a Relationships page for a component or a Relationships page for a component.

This example illustrates the fields and controls on the Relationship Viewer - Maintain Roles page. You can find definitions for the fields and controls later on this page.

Maintain Roles


MMA Property Management Group


Current Roles

| Role | Start Date | End Date |
|------------------------|------------|----------|
| Company | 01/01/1900 | |
| Business Contact (ORG) | 01/01/1900 | |
| Ship To Organization | 01/01/1900 | |
| Sold To Organization | 01/01/1900 | |
| Bill To Organization | 01/01/1900 | |

Add or Reactivate Role Information

Role

Start Date 

End Date 

Add or Reactivate

[Return to Relationship Viewer](#)

When this page initially appears, all the roles that pertain to the specified business object and its start and end dates are listed in the **Current Roles** group box. Roles that were added by the system do not have an end date. If a user-added role does not have an end date, an **Inactivate** button appears next to the role.

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Inactivate | Click this button to inactivate the role. When you click this button, the Maintain Roles - Inactivate Role page appears. Enter the End Date for this role and then click the OK button. |

Add or Reactivate Role Information

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| Role | Select the role to add or reactivate for this business object. |
| Start Date and End Date | Enter the start and end date that this role is in effect. |
| Add or Reactivate | Click this button after you select the role and the start and end date to add or reactivate the role that is for the specified business object. |

Chapter 9

Defining Company Business Objects

Understanding the Company Component

This topic discusses company information.

Company Information

A company is an organization that purchases, leases, or contracts for product or services. In PeopleSoft Customer Relationship Management (PeopleSoft CRM), companies are represented as business objects with an Organization business object type and a Company role type. A record for each company is created in the Company table (RD_COMPANY). Because companies participate in business transactions, a record for the company is also created in the Business Contact table (BC), which enables you to define records for sold-to, bill-to, and ship-to information for the company.

Each company can have one or more addresses that can apply to the company, its sites, or its contacts.

See [Understanding Name and Address Information in CRM](#).

Sites

For each company, you can associate sites, the geographic locations of the company where services are performed, or products shipped or installed. Site records are maintained in the Site table (RD_SITE). When you associate a site with a company, a record is inserted in the Business Object Relationship table (BO_REL) to capture the relationship between the site and the company.

Contacts

You can also define the company's contacts: the people who participate in business transactions on behalf of the company. When you define company contacts in PeopleSoft CRM, you can enter contact information for the contact that is specific to his or her role as a contact of the company. Records for contacts are maintained in the Person table (RD_PERSON). When you associate a person with a company or one of the company's sites, a record is created in the Business Object Relationship table to capture the contact relationship between the person and the company.

Note: If you add a contact who is a company employee whose worker information is *secured*, the contact's home phone number, home email address, and home address do not appear. This information is visible in a HelpDesk case when searching for a worker or if the **Phone Number** or **Email Address** field is selected in the display template, even if the user does not have a secured role.

Attributes

You can configure the Company component to store installation-specific attributes. Because this is a configuration, attributes that you add are not supported by PeopleSoft CRM. If you choose to configure additional attributes, you can make them visible on the Company component by using permission lists.

Integrations

You can also create and maintain company records in PeopleSoft Supply Chain Management or a third-party system and synchronize the company data with PeopleSoft CRM by implementing the following enterprise integration points (EIPs): the Customer EIP, Customer_Company EIP, Customer_Consumer EIP, Customer_Site, and Customer_Contact EIP.

Defining Company Information

To define company information, use the Company (RD_COMPANY_2) component.

These topics discuss how to:

- Access companies.
- View company summary information.
- Maintain general company information.
- Manage company account teams.
- Manage sales team tasks.
- View call reports.
- Add notes.
- Manage company contact information.
- Maintain company relationships.
- Maintain company profile data.
- Maintain tax exempt certificate information.

Pages Used to Define Company Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|----------------------------------------|-------------------------------|-------------------------------------------------|
| <u>Company Search Page</u> | RD_COMPANY_GSRCH | Access an existing company. |
| <u>Company - Summary: Summary Page</u> | RD_COMPANY_SUMMARY | View summary information about the company. |
| <u>Company - Summary: Details Page</u> | RD_COMPANY_DETAILS | Maintain general information about the company. |
| Company - Purchasing Options | RD_COMPANY_CUST_OP | Maintain the company's purchasing information. |

| Page Name | Definition Name | Usage |
|----------------------------------------------|------------------------|---------------------------------------------------------------------------------------|
| <u>Company - Tax Exempt Certificate Page</u> | RD_TAX_EXEMPT_COMP | Maintain the company's tax exempt information. |
| Company - Account Team | RD_ACCOUNT_TEAM | Manage the account team that is assigned to the company. |
| <u>Company - Tasks Page</u> | RD_TASK_LIST | Manage sales team tasks for a company. |
| <u>Company - Call Reports Page</u> | RD_CALLRPT_LST_TXN | View a list of call reports for which the company contacts are named as participants. |
| Company - Billing Accounts | RBT_COMACT_LIST | View a list of billing accounts for the company. |
| <u>Company - Notes Page</u> | RD_COMPANY_NOTE_2 | Maintain notes and attachments for the company. |
| <u>Company - Contact Info Page</u> | RD_COMP_ADDR_BOOK | Manage company contacts, addresses, and sites. |
| <u>Company - Relationships Page</u> | RD_COMPANY_REL | Maintain company relationship information. |
| <u>Company - More Info Page</u> | RD_PROFILE | Maintain company profile data. |
| Company - Attributes | RB_ATTR_RUN_COMP | Maintain company attributes. |

Company Search Page

Use the Company Search page (RD_COMPANY_GSRCH) to access an existing company.

Navigation:

Customers CRM > Search Company

The appearance, behavior, and personalization options for this page are controlled by the search definition for the Company component.

See “Understanding the Configurable Search” (Automation and Configuration Tools).

Company - Summary: Summary Page

Use the Company - Summary: Summary page (RD_COMPANY_SUMMARY) to view summary information about the company.

Navigation:

Customers CRM > Search Company > Company - Summary: Summary

This example illustrates the fields and controls on the Company - Summary: Summary page (1 of 2). You can find definitions for the fields and controls later on this page.

| Company | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Save 360-Degree View Search Previous Next Add Company Add to My Contacts Add Task Personalize | |
| Customer MMA Property Management Group Contact Teri Thomas Phone 651/785-2546 | Location Circle Pines, MN, USA Job Title Management Associate Email tthomas@mma.com |
| Company Account Team Tasks Call Reports Notes Contact Info Relationships More Info Attributes | |
| Summary Details Purchasing Info Tax Exempt Certificate | |
| Company Info | Primary Contact |
| Company Name MMA Property Management Group Address 1200 Lake Drive, Circle Pines, Anoka, CST, MN, 55014, USA Phone 800/988-5644 Fax Email MMA@mma.com Web URL | Name Teri Thomas Title Management Associate Address 1200 Lake Drive, Circle Pines, Anoka, PST, MN, 55014, USA Phone 651/785-2546 Fax Email tthomas@mma.com |
| Details | Details |
| Overview | |
| Customer Type User 1 Business Industry Appliances, Household Electric Country USA Location Type Division Year Started SetID CRM01 | Taxpayer ID Equity Symbol MMAPM Legal Structure Employee Total Parent Company Year Incorporated Company ID 301 |
| | Corporate Hierarchy Details |

This example illustrates the fields and controls on the Company - Summary: Summary page (2 of 2). You can find definitions for the fields and controls later on this page.

| Status | |
|---------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|
| Customer Status Active Customer Since 01/01/2000 | Status Date 11/13/2001 Segment Code Retail |
| Financial Summary | |
| Fiscal Year End Currency Code Revenue Net Income Credit Rating | Equity Symbol MMAPM Exchange Market Cap Stock Price Quote Date |
| | Details |
| Audit History | |
| Created 04/02/2001 10:14PM PDT Modified 02/03/2014 4:40PM PST | By NAPA By VP1 Stu Marx |

Note: When you click any link (for example, the Details link) on this page that takes you to the Contact Info page but the system finds out that you have no permissions to access the page based on your user login, it aborts the page transfer and generates an error message, explaining the possible cause of the error.

Company - Summary: Details Page

Use the Company - Summary: Details page (RD_COMPANY_DETAILS) to maintain general information about the company.

Navigation:

Customers CRM > Search Company > Company - Summary: Details

This example illustrates the fields and controls on the Company - Summary: Details page (1 of 2). You can find definitions for the fields and controls later on this page.

Company

Save

360 360-Degree View

Search

Add Company

Add to My Contacts

Add Task

>>

Personalize

Customer

MMA Property Management Group

Location

Circle Pines, MN, USA

Contact

Teri Thomas

Job Title

Management Associate

Phone

651/785-2546

Email

tthomas@mma.com

Company

Account Team

Tasks

Call Reports

Notes

Contact Info

Relationships

More Info

Attributes

Summary

Details

Purchasing Info

Tax Exempt Certificate

Company Details

*Company

MMA Property Management Group

Country

United States

Incorporated In

DUNS Number

Ownership

Legal Structure

Customer Type

User 1

Business

Website URL

Minority Owned

Corporate Hierarchy

More Names

Taxpayer ID

Location Type

Division

Employee Total

Parent Company

Year Started

Year Incorporated

*SetID

CRM01

*Company ID

301

Privacy

Do Not Contact

Do Not Email

Do Not Call

Do Not Mail

This example illustrates the fields and controls on the Company - Summary: Details page (2 of 2). You can find definitions for the fields and controls later on this page.

Contact Info Entries

*Description Business

Phone

| *Type | Country Code | Number | Ext/PIN |
|----------|--------------|--------------|---------|
| Business | | 800/988-5644 | |
| Pager | | 800/987-4563 | |
| FAX | | | |
| Pager | | | |

Email

| *Type | Email Address |
|----------|---------------|
| Business | MMA@mma.com |
| Other | |

Address

Look up Address

*Type Business

*Country United States

Address 1 1200 Lake Drive

Address 2

Address 3

City Circle Pines

County Anoka

State MN Minnesota

Postal 55014

Set Display

Status and Currency Data

*Customer Status Active

Status Date 11/13/2001

Customer Since 01/01/2000

Segment Code Retail

*Currency Code USD

*Currency Type CRRNT

Credit Rating Value

Assessment Gold

Financial Details

Industry Classifications

Purchasing Options


☒ Sold To Customer This company can make purchases.

☒ Bill To Customer This company can receive bills.

☒ Ship To Customer This company can receive shipments.

Company Details

| Field or Control | Description |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Company Name | Enter the company name. By default, the name that you enter here is the primary name for the company. Click the More Names link to add additional names or designate another name as primary. See Updating Name Information . |
| Customer Type | Select a customer category for use in reports. You can modify the translate values, <i>User 1</i> to <i>User 4</i> , to reflect categories that make sense for customer tracking. For example, <i>User 1</i> might represent manufacturing customers, <i>User 2</i> might represent retail customers, and so on. |
| Business | Enter the customer's business type. |
| Location Type | Select a description of the company location. Values are <i>Branch</i> , <i>Division</i> , <i>Headquarters</i> , <i>Single Location</i> , and <i>Subsidiary</i> . |

| Field or Control | Description |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Parent Company | Enter the name of the parent company. You must establish parent companies in the system before associating them with subsidiaries. When you save the component, the system automatically creates a relationship between the two company business objects. |
|  | Click to transfer to the website that is specified in the Website URL field. |
| Corporate Hierarchy | Click to access a hierarchical tree view of selected relationships that are specified for the company in the Corporate Hierarchy component. |
| Privacy | Select one of these options to indicate the channels for which the company requests stoppage of all unsolicited communications from the business. |

Contact Info

Enter contact information for the company.

See [Address Book Page](#).

Status and Currency Data

| Field or Control | Description |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Customer Status | Select <i>Active</i> or <i>Inactive</i> . |
| Customer Since | <p>Enter the date that the company becomes a customer of your business.</p> <hr/> <p>Note: If you integrate with PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management, you cannot modify the customer status information and the Customer Since date in PeopleSoft CRM.</p> <hr/> |
| Currency Code | Select the code that specifies the currency that you use for a monetary transaction with this company. |
| Currency Type | Select the exchange rate type that is used to calculate monetary transaction amounts in alternate currencies. |

| Field or Control | Description |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Credit Rating Value | Enter the company's credit rating, if it's known. |
| Segment Code | Select the company's business segment for marketing purposes. |
| Assessment | Displays the customer's key performance indicator value that is determined by Performance Management. See Customers and Business Contacts . |

Purchasing Options

Indicate which purchasing tasks are valid for the company.

See [Understanding Purchasing Options](#).

| Field or Control | Description |
|-----------------------------------------------------------------|-----------------------------------------------------------------------------------|
| Sold To Customer, Bill To Customer, and Ship To Customer | Select if the company can make purchases, receive invoices, or receive shipments. |

Company - Account Team Page

Use the Company - Account Team page (RD_ACCOUNT_TEAM) to manage the account team that is assigned to the company.

Navigation:

Customers CRM > Search Company > Company - Account Team

See “Company - Account Team Page” (PeopleSoft Sales)

Company - Tasks Page

Use the Company - Tasks page (RD_TASK_LIST) to manage sales team tasks for a company.

Navigation:

Customers CRM > Search Company > Company - Tasks

Company - Call Reports Page

Use the Company - Call Reports page (RD_CALLRPT_LST_TXN) to view a list of call reports for which the company contacts are named as participants.

Navigation:

Customers CRM > Search Company > Company - Call Reports

Note: The system only displays call reports that have information associated with the displayed company.

Company - Notes Page

Use the Company - Notes page (RD_COMPANY_NOTE_2) to maintain notes and attachments for the company.

Navigation:

Customers CRM > Search Company > Company - Notes

Company - Contact Info Page

Use the Company - Contact Info page (RD_COMP_ADDR_BOOK) to manage company contacts, addresses, and sites.

Navigation:

Customers CRM > Search Company > Company - Contact Info

See [Maintaining Contact Information for Business Objects](#).

Company - Relationships Page

Use the Company - Relationships page (RD_COMPANY_REL) to maintain company relationship information.

Navigation:

Customers CRM > Search Company > Company - Relationships

See [Understanding the Relationship Viewer](#).

Company - More Info Page

Use the Company - More Info page (RD_PROFILE) to maintain company profile data.

Navigation:

Customers CRM > Search Company > Company - More Info

See [Understanding Profiles](#).

Company - Tax Exempt Certificate Page

Use the Company - Tax Exempt Certificate page (RD_TAX_EXEMPT_COMP) to maintain the company's tax exempt information.

Navigation:

Customers CRM > Search Company > Company - Summary: Tax Exempt Certificate

This example illustrates the fields and controls on the Company - Tax Exempt Certificate page. You can find definitions for the fields and controls later on this page.

Company

Save | 360-Degree View | Search | Next | Add Company | Add to My Contacts | Add Task | >> Personalize

Customer M.M.A.
Contact Jim Jacobs
Phone 988-5600(650)

Location Circlepines, MN, USA
Job Title
Email jimjacobsdch@yahoo.com

Company | Account Team | Tasks | Call Reports | Notes | Contact Info | Relationships | More Info | Attributes

Summary | Details | Purchasing Info | **Tax Exempt Certificate**

Tax Exempt Certificate Find | View All First 1 of 1 Last

*Exemption Certificate
 Issuing Authority Authority Type: Federal

Add Certificate Data

Certificate Details

No Tax Exempt Certificate has been added.

| Field or Control | Description |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Exemption Certificate and Issuing Authority | Enter the details for the tax exempt certificate such as exemption certificate number and issuing authority. Record multiple tax exemption certificates for each customer and select an authority type to classify the issuing authority. For each exemption certificate, enter an effective date, status, issued date, and expiration date. |
| Authority Type | Enter the authority type for the associated tax exempt certificate. Values are <i>Europe</i> , <i>Federal</i> , <i>Local</i> , <i>Other</i> , <i>State</i> , and <i>Transport</i> . |
| Status as of Effective Date | Enter the status for the certificate. Values are <i>Active</i> and <i>Inactive</i> . |
| Tax Exempt Category | Select the exemption category for which the customer qualifies with this purchase: <ul style="list-style-type: none"> <i>Blanket</i> Exemption category exists for all purchases of this type. <i>Single Purchase</i> Exemption category exists for the specified purchase only. <i>Other</i> A user-defined exemption category. |
| Exemption License | Select to denote that a tax-exempt license is issued to the customer. |

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|-----------------------------------------------------------------------------------|
| Add Certificate Data | Select the Add Certificate Data button to add tax additional certificates. |

Defining Company Sites

This topic lists the pages used to define company sites.

Pages Used to Define Company Sites

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------|-------------------------------|-----------------------------------------------------------------|
| Company Search | RD_COMPANY_GSRCH | Search for existing companies. |
| Company - Sites | RD_COMPANY_SITE_2 | View a list of company sites and add new sites for the company. |

Related Links

[Defining Customer Sites](#)

Defining Company Contacts

This topic lists the pages used to define a company's contacts.

Pages Used to Define Company Contacts

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|----------------------------------|-------------------------------|-------------------------------------------------------------------------------------------------------------|
| Company - Contact Info: Contacts | RD_COMPANY_CNTCT_2 | Maintain the list of contacts who represent the company in business transactions. |
| Create Contact of <company > | RBQ_QCREATE | Add a contact to a company. |
| Modify <contact> | RBQ_QCREATE | Maintain information for an existing company contact, including purchasing options and contact information. |

Related Links

[Defining Customer Contacts](#)

Modeling Corporate Hierarchy

These topics provide an overview of corporate hierarchy and discuss how to:

- View and modify participation percentages.
- Select the role that appears.

Pages Used to Model Corporate Hierarchy

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|----------------------------------------------------|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Corporate Hierarchy Page</u> | RB_HIER_GRP_BUILD | View and modify the participation percentage of objects in the corporate hierarchy. The Corporate Hierarchy link appears only if a hierarchy exists. |
| <u>Corporate Hierarchy: Extract Hierarchy Page</u> | RB_HIER_GRP_ROLES | Select roles for the hierarchy. |

Understanding Corporate Hierarchy

The Corporate Hierarchy component enables the user to create and maintain Hierarchical Groupings, including the ability to capture the percent ownership of each child to its parent.

The Corporate Hierarchy link is on the Company Summary and Company Details pages of the Company component. The Corporate Hierarchy link is only visible when a Company participates in Hierarchical Relationship(s). The following Relationship Types are currently considered hierarchical:

| <i>Relationship Type ID</i> | <i>Description</i> |
|-----------------------------|-----------------------|
| 4 | Company / Site |
| 17 | Consumer / Site |
| 94 | Manager / Reports to |
| 333 | Board of Directors |
| 20008 | Person / Son/Daughter |
| 20010 | Parent / Child |

| <i>Relationship Type ID</i> | <i>Description</i> |
|------------------------------------|---------------------------|
| 20015 | School / Student |

Understanding Corporate Hierarchy Participation Percentages

The Corporate Hierarchy component enables you to view the list of sites or contacts that compose a customer company and assign a participation percentage to each. For example, if a customer company has three contacts, *Larry Hill*, *Stu Marx*, and *Sandra Thomas*, you might assign participation percents as follows:

| <i>Contact</i> | <i>Percent</i> |
|-----------------------|-----------------------|
| Larry Hill | 40 |
| Stu Marx | 20 |
| Sandra Thomas | 40 |

You can view and assign participation only to the first dependent level in the hierarchy: to the sites and contacts that are directly associated with a company.

A parent may have multiple children, and each child is some percentage of its parent. The sum of all percentages for a given parent shall be less than or equal to 100%. This percentage is called ownership.

Corporate Hierarchy Page

Use the Corporate Hierarchy page (RB_HIER_GRP_BUILD) to view and modify the participation percentage of objects in the corporate hierarchy.

Navigation:

- **Customers CRM > Corporate Hierarchy**
- **Customers CRM > Search Company**

Click the **Corporate Hierarchy** link on the Summary page.

This example illustrates the fields and controls on the Corporate Hierarchy page. You can find definitions for the fields and controls later on this page.

Business Object ID 103

Business Object Name Sparkle Clean Laundromats

First | Previous | Next | Last | Left | Right

Company - Sparkle Clean Laundromats

Site (0%) - Mountain View

Site (0%) - Little Rock

Site (0%) - Jacksonville

Site (0%) - Benton

Site (0%) - Arkansas City

Description

Role Type Company

Node Name Sparkle Clean Laundromats

Company Composition

| Role | Name | Participation Percentage |
|------|---------------|--------------------------|
| Site | Mountain View | <input type="text"/> |
| Site | Little Rock | <input type="text"/> |
| Site | Jacksonville | <input type="text"/> |
| Site | Benton | <input type="text"/> |
| Site | Arkansas City | <input type="text"/> |

Extract Hierarchy

Total Participation Percentage

Corporate Hierarchy: Extract Hierarchy Page

Use the Corporate Hierarchy: Extract Hierarchy page (RB_HIER_GRP_ROLES) to select roles for the hierarchy.

Navigation:

Click the **Extract Hierarchy** link on the Corporate Hierarchy page.

This example illustrates the fields and controls on the Corporate Hierarchy: Extract Hierarchy page. You can find definitions for the fields and controls later on this page.

Corporate Hierarchy

*Role Category ID

Customer and Site

☐ Save as default Search Group

Roles

| | Description |
|-------------------------------------|---------------------|
| <input checked="" type="checkbox"/> | Company |
| <input checked="" type="checkbox"/> | Site |
| <input checked="" type="checkbox"/> | Individual Consumer |

Extract Hierarchy

| Field or Control | Description |
|------------------------------|----------------------------------------------------------------------------------------------------|
| Role Category ID | Select from various types of hierarchies. This field controls the roles from which you can select. |
| Save as default Search Group | Select to save the role selections as the default. |
| Roles | Select roles to appear in the hierarchy. |
| Extract Hierarchy | Click to return to the parent Corporate Hierarchy page and view the hierarchy you selected. |

Defining Site Business Objects

Understanding Sites

Sites in CRM are:

- Customers that are represented by contacts.
- Always associated with a company or a consumer business object.
- Places where products are shipped or installed.
- Places where services are performed.

In the customer data model, sites are represented as organization type business objects with a role type of site. A record for each customer site is created in the Site table (RD_SITE), and a record for the association between a site and a company or consumer is inserted in the Business Object Relationship table (BO_REL). Because the site that is associated with a customer can participate in business transactions, a record for the site is also created in the Business Contact table (BC), which enables you to specify sold-to, bill-to, and ship-to purchasing options for the site.

Site contacts are Person business objects and are also contacts of the company or consumer that is associated with the site. When you associate a person with a customer site, the person is assigned a role type of contact for both the site and the customer with whom the site is associated. Two records are inserted in the Business Object Relationship table (BO_REL): one record to capture the relationship between the person and the site and one record to capture the relationship between the person and the customer who is associated with the site.

You can publish customer site information to PeopleSoft Supply Chain Management (PeopleSoft SCM) by using the following Customer_Site EIP. However, because PeopleSoft Supply Chain Management does not have a site concept, site records are created as customer records in the PeopleSoft Supply Chain Management system. Customer records in PeopleSoft SCM are created only for sites that are flagged as either sold-to or bill-to sites in CRM.

See the documentation, *PeopleSoft: Enterprise Components*.

Related Links

[Customers and Business Contacts](#)

[Defining Information for Business Contacts](#)

[Understanding Name and Address Information in CRM](#)

[Understanding Enterprise Integration Technology](#)

Setting Up Site Types

To set up site types, use the Site Type (RD_SITE_TYPE) component.

This topic discusses how to set up site types.

Page Used to Set Up Site Types

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------|-------------------------------|-------------------------------------------------------------------------------------------------------|
| Site Type | RD_SITE_TYPE | Define codes that you use to categorize sites. Site type IDs must be unique for the specified set ID. |

Maintaining General Site Information

To maintain general site information, use the Site (RD_SITE_2) component.

These topics discuss how to:

- Maintain primary site information.
- Maintain site names.
- Maintain site purchasing options.
- Maintain site contact information.
- Add notes and attachments.

Pages Used to Maintain General Site Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|------------------------------------------|-------------------------------|--------------------------------------------------------|
| Search Site | RD_SITE_GSRCH | Search for existing sites. |
| <u>Site - Site: Primary Page</u> | RD_SITE_MAIN_2 | Maintain primary site information. |
| <u>Site - Site: Name Page</u> | RD_SITE_NAME_PG | Maintain site names. Designate a primary site name. |
| <u>Site - Site: Purchasing Info Page</u> | RD_SITE_CUST_OP_2 | Maintain purchasing information for the site. |

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------------------------------|-------------------------------|-----------------------------------------------------------------------------------------------------|
| <u>Site - Site: Tax Exempt Certificate Page</u> | RD_TAX_EXEMPT_SITE | Maintain tax exempt information for the site. |
| Site - Account Team | RD_ACCOUNT_TEAM | View and modify the account team that is assigned to a site. |
| <u>Site - Contact Info Page</u> | ABE_LIST | Maintain contact information for a site, including addresses, phone numbers, and email information. |
| Site - Contacts | RD_SITE_CNTCT_2 | Maintain site contacts. |
| <u>Site - Notes Page</u> | RD_SITE_NOTE_2 | Add notes and attachments for the specified site. |
| Site - Attributes | RB_ATTR_RUN_SITE | View attributes for the site. |

Site - Site: Primary Page

Use the Site - Site: Primary page (RD_SITE_MAIN_2) to maintain primary site information.

Navigation:

- **Customers CRM > Add Site**
- **Customers CRM > Search Site > Site - Site: Primary**

This example illustrates the fields and controls on the Site -Site: Primary page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Site' page in a CRM system. At the top, there's a navigation bar with 'Save', '360-Degree View', 'Search', 'Next', 'Add Site', 'Add to My Contacts', and 'Personalize'. Below this, the 'Site Name' is 'Minneapolis', 'Site ID' is '478', and 'SetID' is 'CRM01'. The page has tabs for 'Site', 'Account Team', 'Installed Product', 'Notes', 'Contact Info', 'Relationships', and 'Attributes'. The 'Primary' tab is selected, showing sub-tabs for 'Name', 'Purchasing Info', and 'Tax Exempt Certificate'. The 'Profile Information' section includes 'Customer' (MMA Property Management Group), 'Site Restrictions' (empty), 'Site Type' (Branch), '*SetID' (CRM01), and 'Privacy' settings (Do Not Contact, Do Not Email, Do Not Call, Do Not Mail). The 'Purchasing Options' section has checkboxes for 'Sold To Customer' (checked), 'Bill To Customer' (unchecked), and 'Ship To Customer' (checked), each with a description. The 'Status and Currency Data' section includes '*Customer Status' (Active), 'Status Date' (04/05/2001), 'Customer Since' (04/05/2001), 'Segment Code' (RTL), '*Currency' (USD), '*Currency Type' (CRRNT), 'Credit Rating Value' (empty), and 'Assessment' (Gold, 5 stars).

Note: This example page does not show the page regions for entering contact information. Those page regions function similarly to the ones that appear on the Company component.

Name

This page region appears when you add a site. When you subsequently access the site, you must click the **Name** link to edit site name information.

See [Understanding Name and Address Information in CRM](#).

Profile Information

The fields in this page region provide basic information about the site.

| <i>Field or Control</i> | <i>Description</i> |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| Customer | Displays the primary name of the customer with whom the site is associated. Click the transfer button to access the customer's primary information. |
| Site Type | Select the site type. Site types are established on the Site Types page. See Understanding Sites . |

| Field or Control | Description |
|--------------------------|------------------------------------------------------|
| Site Restrictions | Enter comments about any restrictions for the site. |
| Privacy | Select the appropriate privacy options for the site. |

Purchasing Options

Select the purchasing options to enable for this site. Use the Purchasing Info page to enter detail about the selected purchasing options.

See [Defining Purchasing Options for Customers](#).

Status and Currency Data

| Field or Control | Description |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Customer Status | Select <i>Active</i> or <i>Inactive</i> . |
| Customer Since | <p>Enter the date that the site became a customer for your business.</p> <hr/> <p>Note: If you are integrated with PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management, you cannot modify the customer status information and the customer since date in CRM.</p> <hr/> |
| Currency Code | Select the code that specifies the currency that you use for a monetary transaction with this site. |
| Currency Type | Select the exchange rate type that you use to calculate monetary transaction amounts in alternate currencies. |
| Segment Code | Select the site's business segment for marketing purposes. |
| Assessment | Displays the key performance indicator value as determined by PeopleSoft Enterprise Performance Management. |

Contact Info

The primary site address, phone, and email information appear in this page region. To view and edit detail information or additional addresses, click the **More** link or access the Address Book page.

See [Maintaining Contact Information for Business Objects](#).

Site - Site: Name Page

Use the Site - Site: Name page (RD_SITE_NAME_PG) to maintain site names. Designate a primary site name.

Navigation:

Customers CRM > Search Site > Site - Site: Name

See [Understanding Name and Address Information in CRM](#).

Site - Site: Purchasing Info Page

Use the Site - Site: Purchasing Info (purchasing information) page (RD_SITE_CUST_OP_2) to maintain purchasing information for the site.

Navigation:

Access the Site - Site: Primary page. Click the **Purchasing Info** (purchasing information) link.

See [Defining Purchasing Options for Customers](#).

Site - Site: Tax Exempt Certificate Page

Use the Site - Site: Tax Exempt Certificate page (RD_TAX_EXEMPT_SITE) to maintain tax exempt information for the site.

Navigation:

Access the Site - Site: Primary page and click the **Tax Exempt Certificate** link.

See [Understanding the Company Component](#).

Site - Contact Info Page

Use the Site - Contact Info page (ABE_LIST) to maintain contact information for a site, including addresses, phone numbers, and email information.

Navigation:

- **Customers CRM > Search Site > Contact Info**
- **Customers CRM > Add Site > Contact Info**

See [Maintaining Contact Information for Business Objects](#).

Site - Notes Page

Use the Site - Notes page (RD_SITE_NOTE_2) to add notes and attachments for the specified site.

Navigation:

Customers CRM > Add Site > Notes

Customers CRM > Search Site > Notes

Maintaining Site Contacts

This topic discusses how to maintain site contacts.

See [Defining Customer Contacts](#).

Pages Used to Define Site Contacts

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------|-------------------------------|------------------------------------------------------------------------------------------------------------|
| Site - Contacts | RD_SITE_CNTCT_2 | Maintain site contacts. |
| Add Contact | RD_REP_ADD_SRCH | Add a contact of a site. |
| Maintain Contact | RBQ_QCREATE | Maintain purchasing options and contact information entries for a contact of a company, consumer, or site. |

Defining Site Relationships

Access the Site - Relationships page (Customers CRM, Site, Relationships).

See [Understanding the Relationship Viewer](#).

Viewing Installed Products for a Site

This topic discusses how to view installed products for a site.

Pages Used to View Installed Products for a Site

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|--------------------------|-------------------------------|-------------------------------------|
| Site - Installed Product | RD_SITE_INSTPROD | View installed products for a site. |

Defining Person Business Objects

Understanding Persons

These topics discuss:

- Sources of person information.
- Persons.
- Consumers and contacts.
- Workers.
- Persons of interest.

Sources of Person Information

A person in PeopleSoft CRM is created in two ways: either by data entry within a CRM component or by integration with a human resources (HR) system. To avoid unnecessary data redundancy and to maintain data integrity, person data often originates in the HR system and is imported into CRM using enterprise integration points (EIPs) to automatically synchronize data updates between systems. These EIPs are available for person data: CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and WORKER.

Related Links

[Understanding Enterprise Integration Technology](#)

Persons

A person in CRM has one or more of these roles: contact, consumer, worker, or person of interest. Persons with these roles are represented as business objects of the Individual type. CRM stores these business objects in the Person table (RD_PERSON).

Common information is stored for the person and additional information is stored for each specific role that the person has. You can configure the role-specific pages that appear when you initially access the Person component. The contact role pages appear by default. You can add or edit information for other roles that apply to the same person by clicking the appropriate link on the Summary page of the Person component. For example, the **Edit Worker Information** link enables you to edit information that pertains to the person in the Worker role.

Common Person Information

This information is available for all person roles:

- Name.

See [Understanding Name and Address Information in CRM](#).

- Contact information.

See [Contact Information on CRM Components](#).

- User-defined fields.

User-defined fields provide the flexibility for you to define and enter additional person information that is not provided when you receive the product.

- Details information.

This information identifies details about a person, such as a driver's license number, preferred contact methods, and privacy flags.

- User profiles.

User profiles include the person's user IDs, roles, and system permissions.

- Contact Info.

See [Maintaining Contact Information for Business Objects](#).

- Notes.

- More information.

See [Understanding Profiles](#).

Attributes

You can configure the Person component to store installation-specific attributes. Because this is a configuration, attributes that you add are not supported by CRM. If you choose to configure additional attributes, you can make them visible on the Person component by using the Configure Person Component page.

See [Configuring the Person Component](#).

Related Links

[Business Object Relationship Modelling](#)

Consumers and Contacts

Much of the information that appears in the Person component for consumers and contacts is similar. Both consumers and contacts perform the same activities: purchasing, leasing, or contracting for products or services. The difference is that consumers are customers and act on their own behalf, whereas contacts act on behalf of a customer or customer site.

In CRM, consumers are represented as person business objects with a business object type of Individual and a role type of Individual Consumer. Consumer records are maintained in the Person table. Because consumers participate in business transactions, a record for each consumer is also created in the Business Contact (BC) table, which enables you to define records for sold-to, bill-to, and ship-to information for the consumer.

Contacts are represented as business objects with a business object type of Individual and a role type of Contact. When a person is added to the system as a contact, a record for the person is inserted in the Person table. When the person is associated with a company, consumer, or site, a record is inserted in the Business Object Relationship (BO_REL) table to capture the relationship between the person and the company, consumer, or site. In addition to maintaining contact information for the Contact role, you can also maintain a separate set of contact information for a particular relationship for a contact (such as postal and email addresses and telephone and pager numbers) for each company, consumer, and site relationship. This information is used to contact the person when you are performing the contact role for a specific customer or site.

Contact and Consumer Information

This information is available for both consumers and contacts:

- National ID.

See [Defining National ID Types](#).

- Credit cards.
- Tasks.
- Call reports.
- Relationships.

See [Understanding the Relationship Viewer](#).

Consumer-Specific Information

This information is available for consumers only:

- Purchasing options.

See [Understanding Purchasing Options](#).

- Status and currency data.

See [Customers and Business Contacts](#).

- Tax exempt certificates.
- Account teams.

See “Managing Customer Accounts” (PeopleSoft Sales).

- Contacts.

You can associate contacts with a consumer. When you associate a contact with a consumer or one of the consumer's sites, a record is created in the Business Object Relationship table to capture the contact relationship between the contact and the consumer.

- Sites.

Sites are the geographic locations where services are performed or products are sent. Site records are maintained in the Site (RD_SITE) table. When you associate a site with a consumer, a record is

inserted in the Business Object Relationship table to capture the relationship between the site and the consumer.

- Employment history and verification.

Contact-Specific Information

The Customers page is available only for persons with the contact role only.

Workers

A worker is any person who performs work for your organization, including employees and contractors. Worker information is used by the Support, HelpDesk, and Field Service applications and includes job detail and information that is used to manage worker assignment on service orders.

Related Links

[Understanding Workers in CRM](#)

PeopleSoft Call Center Applications

Persons of Interest

A person of interest (POI) does not fit into either the contact, consumer, or worker categories, but is someone for whom your organization needs to maintain data and provide services. Some examples of POIs are pension payees, board members, pre-hires, and retirees.

POIs are defined using a subset of pages in the Person component (contact and consumer-specific pages are not used for POIs). The only required information for a POI is first and last names. Optionally, you can enter contact information, POI type, as well as user profiles for POIs. POIs might also have job information if they are synchronized to CRM from HCM. If a POI is made available in CRM through an integration with HCM and it contains a job record, this data is stored in CRM in read-only mode. If a POI is created online in CRM, a job record cannot be created. Job information is not used for processing transactions within CRM, but, if available, it appears on HRHD 360 Degree View.

POIs contact HR service centers with questions about their or their spouses' benefits, retirement plans, ESPPs and so on. In order for call center agents to capture reported issues quickly in cases when POIs call for the first time, CRM supports the creation of POIs through quick create at two primary entry points where cases get created: HRHD 360 Degree View search page and the employee search in HRHD cases.

Like other quick create enabled business objects, users with access to the Quick Create component can create POIs from there as well.

Configuring the Person Component

These topics discuss how to

- Select the Person default role.
- Define POI types.

To define a person of interest type, use the Person of Interest Type (POI_TYPE_TBL) component.

Pages Used to Configure the Person Component

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|----------------------------------------|-------------------------------|------------------------------------------------------------------------------------------------------------------------|
| <u>Configure Person Component Page</u> | RD_PERSON_CONFIG | Select the default role and the pages that appear in the Person component when a user adds a person or views a person. |
| <u>Person of Interest Type Page</u> | POI_TYPE_TBL | Define the valid POI types. |

Configure Person Component Page

Use the Configure Person Component page (RD_PERSON_CONFIG) to select the default role and the pages that appear in the Person component when a user adds a person or views a person.

Navigation:

Set Up CRM > Common Definitions > Customer > Configure Person Component

This example illustrates the fields and controls on the Configure Person Component page. You can find definitions for the fields and controls later on this page.

Configure Person Component

Default Actions

When User Clicks "Add Person" Button:

- ☒ Add new person with contact details
- ☐ Add new person with consumer details
- ☐ Add new person with worker details
- ☐ Add new person with person of interest details

View for Persons with Multiple Roles:

- ☒ View contact details if the person has Contact role
- ☐ View consumer details if the person has Consumer role
- ☐ View worker details if the person has Worker role
- ☐ View person of interest details if the person has POI role

Configuration and Visibility

Configuration

- ☐ Business to Business
- ☐ Business to Customer
- ☒ Mixed

No related rules have been found.

| Page Object ID | Description | Visible |
|----------------|----------------------------------------------------|---------|
| ACCOUNT_TEAM | Account Team Tab | Yes |
| ADDRESS_BOOK | Contact Info Tab | Yes |
| ADD_CONSUMER | "Add Consumer" Hyperlink in Primary Subtab | Yes |
| ADD_CONTACT | "Add Business Contact" Hyperlink in Primary Subtab | Yes |
| ADD_POI | "Add POI" Hyperlink in Primary Subtab | Yes |
| ADD_WORKER | "Add Worker" Hyperlink in Primary Subtab | Yes |
| ATTRIBUTES | Attributes Tab | No |
| BILL_PAYEES | Bill Payees Tab | Yes |
| CALL_REPORTS | Call Reports Tab | Yes |
| CUSTOMERS | Customers Tab | Yes |
| FIN_ACCOUNTS | Financial Accounts Tab | Yes |
| MORE_INFO | More Info Tab | Yes |

Default Actions

Select the role that is added when a user selects Add Person from the menu and the role that appears when a user selects an existing person.

Configuration and Visibility

| Field or Control | Description |
|--------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Business to Business, Business to Customer, and Mixed | Select an option to indicate whether the CRM installation supports business-to-business, business-to-consumer, or both. The option that you select determines the default page object settings. |

| Field or Control | Description |
|-------------------------|---------------------------------------------------------------------------------------------------------|
| Visible | Select <i>Yes</i> to have the selected page or link appear on the Person pages that appear to the user. |

Person of Interest Type Page

Use the Person of Interest Type page (POI_TYPE_TBL) to define the valid POI types.

Navigation:

Set Up CRM > Common Definitions > Customer > Person of Interest Type > Person of Interest Type

This example illustrates the fields and controls on the Person of Interest Type page. You can find definitions for the fields and controls later on this page.

Person of Interest Type

Person of Interest Type: 00002 **Status as of Effective Date:** Active

Description: Pension Payee

Short Description: Pension

☒ **Job Record Required**

Source Indicator HCM

[Modify System Data](#)

This object is maintained by PeopleSoft.

Audit History

Modified 09/23/2004 4:07PM PDT PPLSOFT

| Field or Control | Description |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Job Record Required | Select if job data is required when POI records of this type are brought into CRM by integration with another system. For records that originate in the CRM system, the system clears this check box. |
| Source Indicator | Select the source of POIs of this type. Value are: <i>CRM</i> , <i>External</i> , <i>HRMS</i> , and <i>SCM</i> . |
| Modify System Data | Click to modify the POI definition. The button label then changes to Stamp System Data . Click Stamp System Data to record changes and flag the definition as changed. |

Defining Person Information

To define person information, use the Person (RD_PERSON) component.

These topics discuss how to:

- View and update primary person information.
- View and update person details.
- Maintain user information.
- Maintain credit card information.
- Maintain sales team tasks for a person.
- Access call reports for a person.
- Access notes and attachments for a person.
- Access billing accounts.
- Maintain contact information for a person.
- View and update person relationships.
- View and update person profile information.

Note: The search page that is used to access person records has two versions, depending on whether the user can view secured worker data. This setting is controlled by permission lists.

Pages Used to Define Person Information

| Page Name | Definition Name | Usage |
|-------------------------------------------------------|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Person Search | RD_PRSN_SRCH | Search for an existing person. This search page appears only for users who can view a worker's secured information. |
| <u>Person (<Role>) - Person: Primary Page</u> | RD_PRSN_PRIMARY | View and update primary (most important and frequently accessed) person information and select the person role to access. As delivered, the <i>Business Contact</i> role appears by default. |
| Person (<Role>) - Edit Labels for User Defined Fields | RD_PRSN_UDF_L_EDIT | Modify the system-defined labels that appear for user-defined fields. |
| <u>Person (<Role>) - Person: Details Page</u> | RD_PRSN_DETAILS | View and update person details. |

| Page Name | Definition Name | Usage |
|----------------------------------------------------------|------------------------|--------------------------------------------------------------------------------------|
| <u>Person (<Role>) - User Profiles Page</u> | RD_PERSON_USER | Maintain user information for a person who is permitted to access the online system. |
| <u>Person (<Role>) - Person: Credit Cards Page</u> | PD_PERSON_CC | Maintain the customer or contact credit card information. |
| <u>Person (<Role>) - Tasks page</u> | RD_TASK_LIST | Maintain sales team tasks for contacting a consumer or contact. |
| <u>Person (<Role>) - Call Reports Page</u> | RD_PRSN_CALL_RPTS | Access call reports for a person. |
| <u>Person (<Role>) - Contact Info Page</u> | RD_PRSN_ADDR_BOOKS | Maintain contact information for a person. |
| <u>Person (<Role>) - Relationships Page</u> | RD_PERSON_REL | View and update the person's relationships with other business objects. |
| <u>Person (<Role>) - More Info Page</u> | RD_PROFILE | View and update a person's marketing profile data. |

Person (<Role>) - Person: Primary Page

Use the Person (<Role>) - Person: Primary page (RD_PRSN_PRIMARY) to view and update primary (most important and frequently accessed) person information and select the person role to access.

As delivered, the *Business Contact* role appears by default.

Navigation:

- Select an existing person on the Person Search page.

Click the **Primary** link.

- **Customers CRM > Add Person**

Click the **Primary** link.

Note: The Person component is used to enter and maintain persons with the Business Contact, Consumer, or Person of Interest roles. The specific role with which you are working is noted with the (<Role>) label in the page title; for example, *Person (Business Contact)*.

This example illustrates the fields and controls on the Person (<Role>) - Person: Primary page (1 of 3). You can find definitions for the fields and controls later on this page.

Person (Business Contact)

Save | 360 360-Degree View | Search | My Contacts | My Tasks | My Calendar | Add Contact | >> Personalize

Name Stu Marx **Phone Number** 555 5551260
Email Address smarx@peoplebank_psft.com

Person | Tasks | Call Reports | Customers | Notes | Contact Info | Relationships | More Info

Primary | Details | User Profiles | Credit Cards

Person Information

Salutation
***First Name** Stu **Middle Name** Manager
***Last Name** Marx **Suffix**
Company **Title** Sales Manager
[More Names](#)

Contact Info Entries

***Description** Home [More...](#)

Phone

| *Type | Country Code | Number | Ext/PIN |
|----------|----------------------|----------------------|----------------------|
| Business | <input type="text"/> | 555 5551260 | <input type="text"/> |
| Cellular | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| FAX | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Pager | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Email

| *Type | Email Address |
|----------|---------------------------|
| Business | smarx@peoplebank_psft.com |
| Other | <input type="text"/> |

Address [Look up Address](#)

***Type** Business
***Country** United States
Address 1 200 Liberty Street
Address 2
Address 3
City New York
County
State NY [New York](#)
Postal 10045
[Set Display](#)

This example illustrates the fields and controls on the Person (<Role>) - Person: Primary page (2 of 3). You can find definitions for the fields and controls later on this page.

Contact Info Entries

***Description** Business [More...](#)

Phone

| *Type | Country Code | Number | Ext/PIN |
|----------|----------------------|----------------------|----------------------|
| Business | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Cellular | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| FAX | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Pager | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Email

| *Type | Email Address |
|----------|----------------------|
| Business | <input type="text"/> |
| Other | <input type="text"/> |

Address [Look up Address](#)

***Type** Business
***Country** United States
Address 1 200 Santa Clara Street
Address 2
Address 3
City Santa Clara
County
State CA [California](#)
Postal 95054
[Set Display](#)

This example illustrates the fields and controls on the Person (<Role>) - Person: Primary page (3 of 3). You can find definitions for the fields and controls later on this page.

User Defined Fields

Field 1

Field 2

Field 3

Field 4

Field 5

Field 6

Field 7

Field 8

Field 9

Field 10

[Edit User Defined Field Labels](#)

[Add Consumer Information](#)

[Edit Worker Information](#)

[Add Person of Interest Information](#)

When you first access this page in add mode, the page is titled Person (Business Contact). When you access information for an existing person who either has the Contact role only or both the Contact and Consumer roles, the page is titled Person (Business Contact). The page is titled Person (Consumer) if you are viewing information for a person who has only the Consumer role.

You can configure which role appears by default when you add a person or search for a person who has both the Contact and Consumer roles.

See [Configuring the Person Component](#).

The links at the bottom of the page enable you to view information for another person role. Different links appear depending on which role is currently shown. For example, when the Consumer pages appear, the link is **Add Contact Information** or **Edit Contact Information**. The links show the words *Add* or *Edit* depending on whether the role information already exists for the person.

| Field or Control | Description |
|---------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add Consumer Information and Edit Consumer Information | <p>Click to add the Consumer role to the person or, if the Consumer role already exists for the person, to edit consumer information. The common information appears, but consumer-specific pages appear instead of contact-specific pages.</p> <hr/> <p>Note: This link appears if the Contact pages for a person currently appear.</p> <hr/> |
| Add Contact Information and Edit Contact Information | <p>Click to add the Contact role to the person or, if the Contact role already exists for the person, to edit contact information.</p> <hr/> <p>Note: This link appears only if the Consumer pages for a person currently appear.</p> <hr/> |
| Add Worker Information and Edit Worker Information | <p>Click to add or edit worker information for the person. The common information appears, but worker-specific pages appear instead of contact-specific pages.</p> <hr/> <p>Note: The Worker component is the primary place where worker information is viewed and updated.</p> <hr/> <p>See Understanding Workers in CRM.</p> |

| <i>Field or Control</i> | <i>Description</i> |
|------------------------------------------------------------------------------------------|---------------------------------------------------------------------|
| Add Person of Interest Information and Edit Person of Interest Information | Click to add or edit person of interest information for the person. |

Person Information

Enter basic name information. The name information appears differently depending on the country that is specified for the user. For example, in Japan, the last name appears in order before the first name.

See [Updating Name Information](#).

For double-byte operating systems, you can enter the name and address information in alternate character format.

Contact Info Entries

Enter address, phone, and email information. Two **Contact Info Entries** regions appear on this page: one for home information and one for business information.

See [Maintaining Contact Information for Business Objects](#).

Alternate Character

For double-byte operating systems, you can enter the name and address information in alternate character format.

User-Defined Fields

You can define up to 10 fields in which to enter and store information that is useful to you. This information is stored on a separate table in the database and is available for users that you create.

| <i>Field or Control</i> | <i>Description</i> |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| Edit User Defined Field Labels | Click to enter labels for user-defined fields. For example, you might change the label Field 1 to Name of Pet . |

Person (<Role>) - Person: Details Page

Use the Person (<Role>) - Person: Details page (RD_PRSN_DETAILS) to view and update person details.

Navigation:

Click the **Details** link on the Person page.

This example illustrates the fields and controls on the Person (<Role>) - Person: Details page. You can find definitions for the fields and controls later on this page.

Person (Business Contact)

Save

360 360-Degree View

Search

My Contacts

My Tasks

My Calendar

Add Contact

>>

Personalize

Name

Stu Marx

Phone Number

555 5551260

Email Address

smarx@peoplebank_psft.com

Person

Tasks

Call Reports

Customers

Notes

Contact Info

Relationships

More Info

Primary

Details

User Profiles

Credit Cards

Profile Information

Person ID

0011

*Contact Flag

Internal Corporate Contact

Driver's License

License Expires

Pref. Contact

Call

Language

English

License Issued By

Manager

*Pref. Notification

Email

Privacy Options

☐ Do Not Contact

☐ Do Not Email

☐ Do Not Call

☐ Do Not SMS

☐ Do Not Mail

The example that is shown is for the Business Contact role. If you are viewing information for a person with the Consumer role, the **Purchasing Options** and **Status and Currency Data** page regions appear.

Profile Information

| Field or Control | Description |
|------------------|-----------------------------------------------------------------------------|
| Privacy | Select an option to indicate restrictions on ways of contacting the person. |

Purchasing Options

This page region appears only for a person with the Consumer role.

See [Understanding Persons](#).

Person (<Role>) - User Profiles Page

Use the Person (<Role>) - Person: User Profiles page (RD_PERSON_USER) to maintain user information for a person who is permitted to access the online system.

Navigation:

Click the **User Profiles** link on the Person page.

This example illustrates the fields and controls on the Person (<Role>) - Person: User Profiles: User Summary page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Person (Business Contact)' page. At the top, there's a navigation bar with 'Save', '360-Degree View', 'Search', 'My Contacts', 'My Tasks', 'My Calendar', 'Add Contact', and 'Personalize'. Below this, the contact's name 'Stu Marx' and email 'smarx@peoplebank_psft.com' are displayed. A secondary bar shows 'Phone Number 555 5551260'. A tabbed interface includes 'Person', 'Tasks', 'Call Reports', 'Customers', 'Notes', 'Contact Info', 'Relationships', and 'More Info'. The 'User Profiles' tab is active, showing a 'User Summary' section with a list of user IDs: AK, IMPORT, JPN, PSCR, PSTG, SMARX, and VP1. A 'Personalize' link and pagination controls (First, 1-7 of 7, Last) are also present. An 'Add New User' button is at the bottom.

In the **User Summary** region, the user IDs that are already associated with the person appear. If no users are associated, then no user information appears.

| Field or Control | Description |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| User ID | Click a user ID to access the detailed user profile information. |
| Add New User | Click to add a new user. When you click this button, more fields appear on the page for you to enter information about the user. |

User Information Detail Page

Navigation:

Click the **User Profiles** link on the Person page.

This example illustrates the fields and controls on the Person (<Role>) - Person: User Profiles: User Information Detail page. You can find definitions for the fields and controls later on this page.

Person (Business Contact)

Save | 360-Degree View | Search | My Contacts | My Tasks | My Calendar | Add Contact | >> Personalize

Name: Stu Marx | Phone Number: 555 5551260
Email Address: smarx@peoplebank_psft.com

Person | Tasks | Call Reports | Customers | Notes | Contact Info | Relationships | More Info

Primary | Details | **User Profiles** | Credit Cards

User Information Detail

| Logon Information | | Permission Lists | |
|-------------------|--------|--------------------------------------|----------|
| *User ID | IMPORT | Process Profile | ALLPAGES |
| *Password | | Primary | ALLPAGES |
| *Confirm Password | | <input type="checkbox"/> Locked Out? | |

Contact Roles

| Role Name | Description | | |
|-----------------|------------------------------|---|---|
| EOPP_USER | Common Portal User | + | - |
| | Employee | + | - |
| PAPP_USER | Enterprise Portal User | + | - |
| | Env. Mgmt. Packaging | + | - |
| | PeopleSoft Admin Privileges | + | - |
| PeopleSoft User | PeopleSoft User | + | - |
| | ALLPAGES | + | - |
| | Can start application server | + | - |

User Information Detail

Enter user ID, password, and permission list information for the user.

Contact Roles

You can grant security roles to the person who is associated with the user ID. The **Role Name** field lists only roles that you have permission to grant based on your user ID.

Person (<Role>) - Person: Credit Cards Page

Use the Person (<Role>) - Credit Cards page (PD_PERSON_CC) to maintain the customer or contact credit card information.

Navigation:

Click the **Credit Card** link on the Person page.

This example illustrates the fields and controls on the Person (<Role>) - Person: Credit Cards page. You can find definitions for the fields and controls later on this page.

The **Credit Card Summary** section lists all the saved credit card entries created for the person, which can be used to pay for charges pertaining to cases, service orders, agreements, and orders.

| Field or Control | Description |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Primary | Indicates the selected credit card to be the default entry that is used to pay for charges to which the person is liable. |
| Credit Card Number | Click the link to access the detailed information of the selected credit card. See “Credit Card Information Page” (PeopleSoft Call Center Applications). |
| Expiration Date | Displays the expiration date of the corresponding credit card. |
| Status | Select a status for the credit card. The system populates only <i>active</i> credit card entries in supported transactions as payment options. |
| Add Credit Card | Click to add new credit card entries. |

Person (<Role>) - Tasks page

Use the Person (<Role>) - Tasks page (RD_TASK_LIST) to maintain sales team tasks for contacting a consumer or contact.

Navigation:

Select the Tasks tab on any page in the Person component.

Person (<Role>) - Call Reports Page

Use the Person (<Role>) - Call Reports page (RD_PRSN_CALL_RPTS) to access call reports for a person.

Navigation:

Select the Call Reports tab on any page in the Person component.

Person (<Role>) - Notes Page

Access the Person (<Role>) - Notes page.

Person (<Role>) - Contact Info Page

Use the Person (<Role>) - Contact Info page (RD_PRSN_ADDR_BOOKS) to maintain contact information for a person.

Navigation:

Select the Contact Info tab on any page in the Person component.

See [Maintaining Contact Information for Business Objects](#).

Person (<Role>) - Relationships Page

Use the Person (<Role>) - Relationships page (RD_PERSON_REL) to view and update the person's relationships with other business objects.

Navigation:

Select the Relationships tab on any page in the Person component.

Person (<Role>) - More Info Page

Use the Person (<Role>) - More Info (person - more information) page (RD_PROFILE) to view and update a person's marketing profile data.

Navigation:

Select the More Info tab on any page in the Person component.

See [Understanding Profiles](#).

Defining Information for Business Contacts

This topic lists the pages that are used to define information for business contacts.

Pages Used to Define Information for Business Contacts

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---------------------------------------|------------------------|---------------------------------------------------------------------|
| Person (Business Contact) - Customers | RD_PERSON_COMP | Maintain the customers that are associated with a business contact. |

| Page Name | Definition Name | Usage |
|----------------------------------------------------------------------|------------------------|-----------------------------------------------|
| Person (Business Contact) - Add Customer / Site / Purchasing Options | RD_PERSON_ADD_COMP | Add customers for a contact. |
| Search For Customer | RBQ_BOSRCH | Search for a customer to add for the contact. |

Defining Consumer Information

These topics discuss how to:

- Maintain tax exempt information for a consumer.
- Maintain purchasing options for a person.
- Define account teams.
- Define account plans.
- Maintain consumer contact information.

Pages Used to Define Consumer Information

| Page Name | Definition Name | Usage |
|----------------------------------------------------------------|------------------------|-------------------------------------------------------------------------------------------------------------|
| <u>Person (Consumer) - Person: Purchasing Page</u> | RD_CONSUMER_BC_OPT | Maintain purchasing options for a person. |
| Person (Consumer) - Person: Employments | RD_PERSON_EMPLOY | Add a person's employment history. |
| <u>Person (Consumer) - Person: Tax Exempt Certificate Page</u> | RD_TAX_EXEMPT_CONS | Maintain a person's tax exemption information. |
| <u>Person (Consumer) - Account Team Page</u> | RD_ACCOUNT_TEAM | Define the account team that is assigned to the consumer. |
| Person (Consumer) - Contact Info: Contacts | RD_CONSUMER_REP | Maintain the list of contacts for a consumer. |
| Create Contact of <consumer> | RBQ_QCREATE | Add a contact to a consumer. |
| Modify <contact> | RBQ_QCREATE | Maintain information for an existing company contact, including purchasing options and contact information. |

| Page Name | Definition Name | Usage |
|----------------------------|------------------------|----------------------------------------------------|
| Person (Consumer) - Sites | RD_CONSUMER_SITE_2 | Maintain the list of sites for a consumer. |
| Create Site of <consumer > | RBQ_QCREATE | Add a site to a consumer. |
| Modify <site> | RBQ_QCREATE | Maintain information for an existing company site. |

Person (Consumer) - Person: Tax Exempt Certificate Page

Use the Person (Consumer) - Person: Tax Exempt Certificate page (RD_TAX_EXEMPT_CONS) to maintain a person's tax exemption information.

Navigation:

Click the **Tax Exempt Certificate** link on the Person page for a person with the Consumer role.

See [Understanding the Company Component](#).

Person (Consumer) - Person: Purchasing Page

Use the Person (Consumer) - Person: Purchasing page (RD_CONSUMER_BC_OPT) to maintain purchasing options for a person.

Navigation:

- Add Person

Click the **Purchasing** link.

- Select an existing person on the Person Search page.

If the **Purchasing** link does not appear, click the **Add Consumer Information** link or **Edit Consumer Information** link, whichever appears.

Click the **Purchasing** link.

See [Understanding Purchasing Options](#).

Person (Consumer) - Account Team Page

Use the Person (Consumer) - Account Team page (RD_ACCOUNT_TEAM) to define the account team that is assigned to the consumer.

Navigation:

Select the Account Team tab on any page in the Person component for a person with the Consumer role.

This example illustrates the fields and controls on the Person (Consumer) - Account Team page. You can find definitions for the fields and controls later on this page.

You can add team members to the account team individually or automatically by using sales territory trees and assignment groups.

See “Company - Account Team Page” (PeopleSoft Sales).

Person (Consumer) - Contact Info Page

Use the Person (Consumer) - Contact Info: Contacts page (RD_CONSUMER_REP) to maintain the list of contacts for a consumer.

Navigation:

Customers CRM > Search Person > Person (Individual Consumer) > Contact Info

Click the **Contacts** link.

The Contact Info page enables you to maintain addresses, contacts, and sites for the consumer.

See [Defining Customer Contacts](#), [Defining Customer Sites](#).

Defining Person of Interest Information

To define POI information, use the Person (RD_PERSON) component by clicking the Add Person of Interest Information or Add Person (Person of Interest) link that appears at the bottom of the Person (<Role>) - Person: Primary page. The information that you can enter for persons of interest is basic person data, as described previously in these topics. If the POI originated in an HR system, the person might have job records associated with them.

Related Links

[Persons of Interest](#)

Deleting An Employee

This topic discusses the process of deleting all personally identifiable information (PII) of an employee.

PII includes the employee’s name, date of birth (DOB), address, email ids, phone numbers, other contact details and job-related information. Once an employee is deleted, all fields related to personal details of

the employee, except for the name, become blank. All name fields reflect ‘Deleted Entry’ in place of the deleted employee’s name.

Pages Used to Delete an Employee

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-----------------------------|------------------------|----------------------------------------------------------------------------------------------------|
| <u>Employee Delete Page</u> | EMP_DEL | Enter the Person ID of an employee and run the process to remove all PII related to that employee. |

Employee Delete Page

Use the **Employee Delete** page (EMP_DEL) to enter the Person ID of an employee and run the process to remove all PII related to that employee.

Note: The Employee Delete process uses the permission list CRRB9021.

Navigation:

Set Up CRM > Utilities > Employee Delete

This example illustrates the fields and controls on the Employee Delete page.

The screenshot shows the 'Employee Delete' page within the 'HR Service Manager' application. The page has a dark blue header with the title 'Employee Delete'. Below the header, there is a navigation bar with 'New Window' and 'Personalize Page' options. The main content area displays 'Run Control ID: 001' and a 'Person ID' input field. There are also links for 'Report Manager' and 'Process Monitor', and a 'Run' button.

| <i>Tables where rows of PII data are deleted</i> | <i>Tables where rows of PII data are updated</i> |
|--------------------------------------------------|--------------------------------------------------|
| CM_ADDRESS | BO |
| CM_PHONE | BO_NAME |
| CM_EMAIL | RD_PERSON |
| CM_PAGER | RD_PERS_NID |
| CM | BO_BASIC_IND |
| BO_CM | |
| BO_SRCH_ADD | |
| BO_SRCH_PHN | |
| BO_SRCH_EML | |
| RB_CREDIT_CARD | |
| RD_WRKR_ASGN | |
| RD_WRKR_JOB | |

Chapter 12

Defining Workers

Understanding Workers in CRM

These topics discuss:

- Workforce administration.
- Options for creating workers.
- Job information and effective dates.

Workforce Administration

Worker refers to anyone who performs work for an organization, including employees and contractors. Employees who are not part of the CRM workforce are considered CRM customers in the sense that they might call the help desk or HR help desk for assistance with problems. These topics focus on maintaining the information that is necessary to administer workers who are part of the CRM workforce and to assign them to field service and support tasks.

In CRM, workers are represented as Person business objects with a role type of Worker. The Person table (RD_PERSON) contains a record for each worker, with **Person ID** as the key field. Attributes that are specific to the person's role as a worker, such as employee status, job location, work function, and so forth, are stored in the Worker table (RB_WORKER).

Workers are not tracked as business contacts, although you can assign the Contact role to a worker.

See [Person \(<Role>\) - Person: Primary Page](#).

Worker User Preferences and Security

Workers often have access to the CRM system to perform their functions. You can control worker access to data for system functions.

Worker Foundational Data

Worker foundational data is the control information (or prompt tables) from which you select when creating a worker. This data describes the organization infrastructure in which workers perform. You can maintain these tables in CRM, PeopleSoft Human Capital Management (PeopleSoft HCM), or a third-party system and move the data to CRM by implementing enterprise integration points (EIPs).

This is the worker foundational data that you must set up before creating workers:

- Job codes.

Use the Job Code Table EIP to integrate with an HR system.

- Department tables.

Use the Department Table EIP to integrate with an HR system.

- Locations.
- Competency information.

Worker competency information determines which workers are best qualified for assignment to a case or service order. Use the Competency Type, Rating Model, and Competency EIPs to integrate with an HR system.

See [Understanding Enterprise Integration Technology](#).

Navigation

CRM provides two ways to access pages that you might use when setting up worker data: the left-hand menu and the Worker Administration Center. This topic lists the left-hand menu navigation.

Options for Creating Workers

After you set up the foundational data, you create workers in several ways:

- Use the Person or Worker component to create and maintain worker records in CRM.

When you create a worker in the Worker component, you can create a new worker, copy data from an existing worker, or copy data from a template worker.

- Integrate worker data with PeopleSoft HCM or a third-party HR system.

You implement the Personal Data, Workforce Data, and Person Competencies EIPs to populate the Person, Worker, and Worker Competency tables in the CRM system .

If you integrate with an HR system that maintains worker data, do not modify the personal data, job detail, and competencies that are entered in the human resource system. You should use the Worker pages in CRM to maintain only user profiles, notes, and worker data that is used by the CRM assignment engine.

- Use quick create functionality.

The Quick Create component requires that you enter the minimum required information and is used to quickly enter data. Quick create of workers is also supported through HRHD 360-Degree View and Worker 360-Degree View.

Copying Existing and Template Workers

Creating a worker by copying an existing worker and creating a worker by copying a template worker are similar processes. The difference is in the way in which you identify the information to copy. When you copy an existing worker, you must search through the entire Worker table to identify the worker to copy; but when you copy a template worker, you can select the worker to copy from a drop-down list box that contains only workers who are designated as template workers.

Template workers are workers whose information represents a model to use when you create other workers. You can set up dummy workers, such as CSR Level 1, as template workers. You can also

identify employees who are good template workers. For example, employee John Smith is a good template worker for CSR Level 1. You designate a worker as a template worker when you enter the job detail for the worker. Whether you designate real employees or set up dummy workers for templates is an implementation consideration.

When you create a worker by copying an existing worker or a template worker, all active worker roles are copied to the new worker. Current active job details for all assignments are copied, but not historical or future job details.

Worker Toolbar

The worker toolbar contains a **Create from Current** button that you can use to create a new worker from a worker whose data you are currently viewing and a **Copy Data** button that you can use to copy the worker's data to another worker.

Related Links

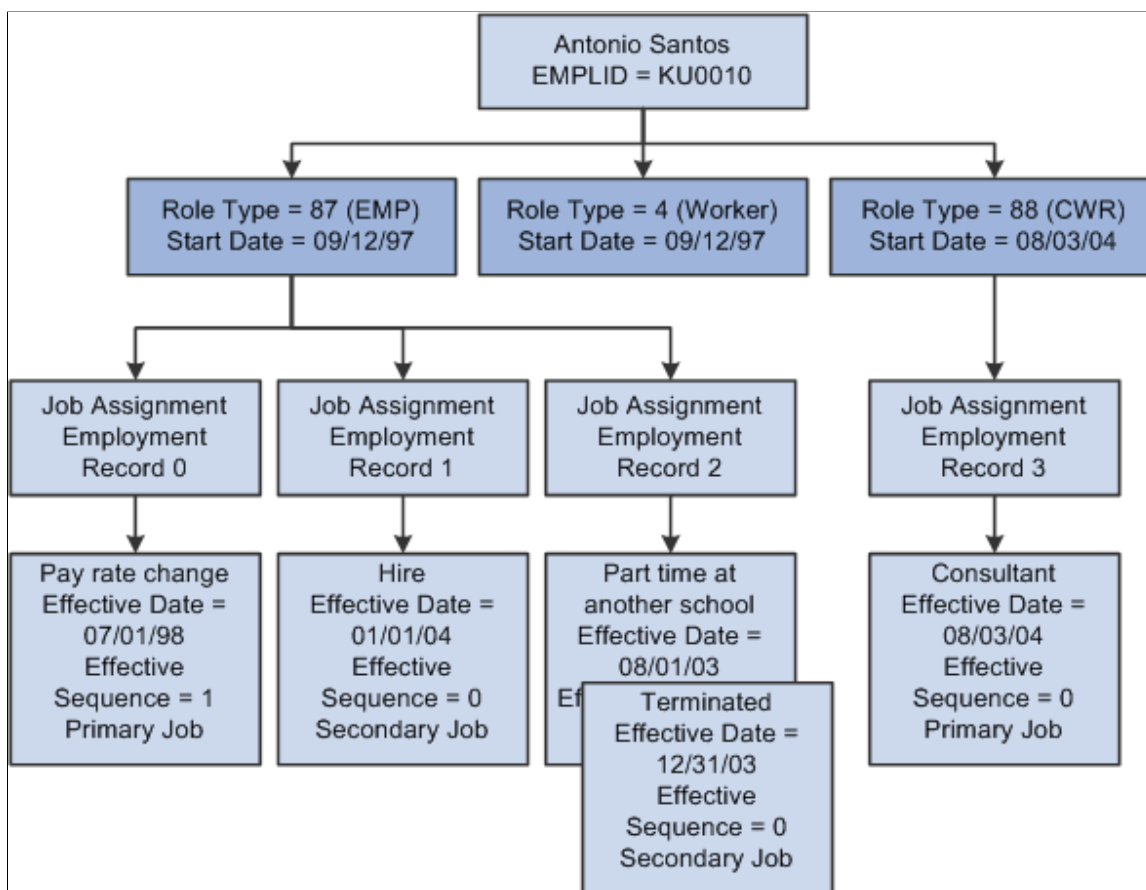
[Understanding Enterprise Integration Technology](#)

Job Information and Effective Dates

A worker's job assignments and their relation to the organization can change over time. For example, a worker can be promoted, perform a different job, or change from employee to contingent worker status. Changes in a worker's job and organizational relationships are represented in the database by effective-dated assignment and job detail rows.

The current row is the most recent row for which the effective date is before the current date. Future-dated rows are all rows for which the effective date is after the current date, and historical rows are all rows for which the effective date is before the effective date of the current row.

This diagram illustrates the use of effective dates in managing a worker's assignments, roles, and job information:



In this example, Antonio Santos was hired on September 1997. Antonio is assigned the Worker and Employee roles as of his hire date, and the effective date of both roles is set to the date of hire. Initially, the end date for both roles is set to 12/31/2999.

Assignments and Roles

All workers have the *Worker* role by default, and must also have either the *Employee* or *Contingent Worker* role on each assignment. The *Worker* role is terminated only when all assignments for the worker are terminated.

Each worker can have multiple assignments, and an assignment can have multiple effective-dated job detail records for it. You can add a new job assignment without changing existing job records. The first job record that you add for new job assignments always has the *Hire* action code, and you must specify the worker's role for each assignment. An assignment is terminated when all active job records that relate to it are terminated.

Jobs

There are two levels of primary jobs. One at the job level is user-selected and could be called the *primary job*. Another primary job is system-defined and could be called the *primary job assignment*. The primary job assignment is determined by an algorithm and takes into consideration the primary job. A worker can have only one primary job assignment.

By default, the first job record added for a role is marked as the *Primary* job record for that role. The primary job assignment is used by the Assignment Engine when assigning workers to cases or service orders.

If a worker requires new job data for an existing assignment, for example, a new supervisor ID, job code, or location, you create a new effective-dated job record for that assignment. When Antonio receives a pay increase, a new job record is inserted, effective July 1, 1998 to reflect the change. The new current record becomes the primary record. A background job runs to mark the primary flag on future job records.

Inactivating Provider Group Memberships for Worker Terminated in HCM

If a worker is scheduled to be terminated in an integrated HCM system on a future date, the same status change in the corresponding CRM worker record is handled in the background through the WORKFORCE_SYNC EIP and reflected on the record properly when the termination date arrives. In a situation where the worker is a member of a provider group, such relationship needs to be inactivated as well.

CRM delivers an application engine (AE) program to dissociate terminated workers from their provider groups. This program, named *PGRP_JOB*, is scheduled to run nightly to identify terminated workers and inactivate any of their existing provider group memberships. When the update is completed, the status of a terminated worker is set to *Inactive* on the Provider Groups page of the related provider group. Similarly, the status of the provider group is set to *Inactive* on the Groups page of the terminated worker's record.

Creating Workers

To create workers, use the Add Worker (RD_CREATE_WORKER) and Copy Worker (RD_COPY_WRKR_DATA) components.

These topics list prerequisites and discuss how to:

- Select the method for creating a worker.
- Select information to copy to a new worker.
- Create workers using the Quick Create function.

Pages Used to Create Workers

| Page Name | Definition Name | Usage |
|---------------------------------------------------------|------------------------|------------------------------------------------------------------------------------------|
| Add Worker: Select Creation Method Page | RD_CREATE_WORKER | Select the method for creating a new Worker business object. |
| Add Worker: Select Data to Copy Page | RD_COPY_OPTIONS | Select information to copy to a new worker from either a template or an existing worker. |

| Page Name | Definition Name | Usage |
|---------------------------|------------------------|------------------------------------------------------|
| Add Worker | RD_COPYWRKR_CONFRM | Verify that the worker information is correct. |
| <u>Create Worker Page</u> | RBQ_QCREATE | Add a worker with the minimum necessary information. |

Prerequisites

Before you create workers, you must set up the tables that contain information that is referred to by all workers. For example, each worker belongs to a department and has a job code. The information in these tables is called foundational data.

See [Setting Up Foundational Data for Workers](#).

Add Worker: Select Creation Method Page

Use the Add Worker page (RD_CREATE_WORKER) to select the method for creating a new Worker business object.

Navigation:

Workforce > Add Worker > Add Worker

This example illustrates the fields and controls on the Add Worker page. You can find definitions for the fields and controls later on this page.

Add Worker

Select Creation Method

☒ **Template Worker**

☐ **Existing Worker**

☐ **New Worker**

Information for New Worker

*First Name

*Last Name

Employee ID

Select Creation Method

| <i>Field or Control</i> | <i>Description</i> |
|-------------------------|------------------------------------------------------------------------------------------------------------------------|
| Template Worker | Select to create the new worker from a template worker. Select the template worker from the drop-down list box. |
| Existing Worker | Select to create the new worker from an existing worker. Search for and select the worker to copy. |
| New Worker | Select to access the Worker component and enter information for the new worker. |

Information for New Worker

Enter the first and last names for the new worker, and optionally enter the employee ID.

Add Worker: Select Data to Copy Page

Use the Add Worker page (RD_COPY_OPTIONS) to select information to copy to a new worker from either a template or an existing worker.

Use the Add Worker page (RD_COPYWRKR_CONFRM) to verify that the worker information is correct.

Navigation:

Access the Add Worker page.

- Select the **Template Worker** option and select a template worker from the available choices.

Enter the first and last names.

Click the **Continue** button.
- Select the **Existing Worker** option and select an existing worker.

Enter the first and last names.

Click the **Continue** button.
- Click the **Create Worker** button on the second Add Worker page.

This example illustrates the fields and controls on the Add Worker page. You can find definitions for the fields and controls later on this page.

Add Worker

Worker Selection

Copy From Spencer Underwood

New Worker Mary Kumar

Select Data to Copy

Select the data you wish to copy. Any existing data for target worker will be erased.

☒ **Work Schedule**
☒ **Skills and Competencies**

☒ **Provider Group Membership**
☒ **Assignment Criteria**

☒ **Job Detail (HCM Information)**

The following Copy Options require User ID and Password:

☒ **CRM User Preferences**
☒ **Group Worklist Membership**

☐ **MCF Email and Chat Settings**
☒ **User Profile Information**

User ID

Password

Confirm Password

Select Data to Copy

Select the data to copy from the template worker or existing worker to the new worker. The job detail data is selected and copied by default—you cannot deselect this check box.

If you select **User Profile Information**, **CRM User Preferences**, **MCF Email and Chat Settings** (multichannel framework email and chat settings), or **Group Worklist Membership**, you must enter a user ID and password for the new worker.

Related Links

Automation and Configuration Tools

Create Worker Page

Use the Create Worker page (RBQ_QCREATE) to add a worker with the minimum necessary information.

Navigation:

Customers CRM > Quick Create

Search for a description of *The Worker*.

This example illustrates the fields and controls on the Create Worker page (1 of 2). You can find definitions for the fields and controls later on this page.

Create Worker

Worker

[Search Existing Person](#)

Format for:

Prefix:

*First Name:

*Last Name:

Middle Name:

Suffix:

Job Assignment

Effective Date:

Worker Role:

*Job Code SetID:

*Job Code:

*Department SetID:

*Department:

*Location SetID:

*Location Code:

This example illustrates the fields and controls on the Create Worker page (2 of 2). You can find definitions for the fields and controls later on this page.

Contact Info Entries

Contact Info

*Description:

Phone

| *Type | Country Code | Number | Ext/PIN |
|---------------------------------------|----------------------|----------------------|----------------------|
| <input type="text" value="Home"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Cellular"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="FAX"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Pager"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Email

| *Type | Email Address |
|------------------------------------|----------------------|
| <input type="text" value="Home"/> | <input type="text"/> |
| <input type="text" value="Other"/> | <input type="text"/> |

Address

[Look up Address](#) [More...](#)

*Type:

*Country:

Address 1:

Address 2:

Address 3:

City:

County:

State:

Postal:

You can use this page in two modes:

- To enter information for a new worker.

You can create only one effective-dated job row. This page does not enable you to set up security information, that is, user IDs, roles, and passwords.

- To retrieve and modify existing worker information.

Note: In addition to the Quick Create component, you can access this page from the HRHD 360-Degree View and Worker 360-Degree View when you select to create workers from their search pages.

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Search Existing Person | <p>Click to retrieve the information for an existing person. You can modify the information and click the Apply button to update the database.</p> <hr/> <p>Note: Job assignment information does not appear for an existing worker.</p> <hr/> |

Maintaining Worker Information

To maintain worker information, use the Worker (RD_WORKER_2) component.

These topics discuss how to:

- View and maintain summary worker information.
- View and maintain worker details.
- View and maintain user profiles.
- Enter job details.
- View assignment summary information.
- Define default schedules.
- Associate competencies with workers.
- Define job assignment criteria.
- Associate workers with provider groups and worklists.
- Define default storage locations.
- Define default signatures.

Pages Used to Maintain Worker Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------|-------------------------------|-------------------------------------------|
| Worker | RD_WORK_GSRCH | Search the database for existing workers. |

| Page Name | Definition Name | Usage |
|----------------------------------------------|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Person | RD_PERSON_SEARCH | Search the database for existing persons. To access the Worker component for a person, click the Add Worker Information or Edit Worker Information link on the Person - Summary page. |
| <u>Worker - Worker: Primary Page</u> | RD_PRSN_PRIMARY | View and update summary information for a worker. |
| <u>Worker - Worker: Details Page</u> | RD_PRSN_DETAILS | View and maintain worker profile information. |
| <u>Worker - Worker: User Profiles Page</u> | RD_PERSON_USER | Maintain the worker's user profile. |
| <u>Worker - Job: Job Details Page</u> | RD_WORKER_DETAIL | Enter information about the specified worker's job. |
| <u>Worker - Job: Job Summary Page</u> | RD_ASGN_JOB | View assignment summary information for the worker. |
| <u>Worker - Work Schedule Page</u> | RD_WORKER_SCHEDULE | Define default workdays for the specified worker. |
| <u>Worker - Skills and Competencies Page</u> | RD_WORKER_CMP_PROF | Associate the specified worker with a competency and define the worker's level of proficiency for the competency. |
| <u>Worker - Assignment Criteria Page</u> | RD_WORKER_CRITERIA | Define criteria that the assignment engine uses to match the specified worker to a case or service order. |
| <u>Worker - Groups Page</u> | RD_WORKER_GROUPS | Associate the worker with provider groups and group worklists. |
| <u>Worker - Storage Locations Page</u> | RD_WORK_STORLOC | Define inventory storage locations that are associated with good and defective storage locations on a field service worker's truck. |
| <u>Worker - Signature Page</u> | RD_WORKER_WF_SIG | Define a default signature to use when the specified worker sends manual notifications. |
| Worker - Notes | RD_PERSON_NOTES | Add notes and attachments for the specified worker. |

| Page Name | Definition Name | Usage |
|-----------------------|------------------------|----------------------------------------------------|
| Worker - Address Book | RD_PRSN_ADDR_BOOKS | View and update a worker's contact information. |
| Worker - More Info | RD_PROFILE | View and update a worker's marketing profile data. |

Worker - Worker: Primary Page

Use the Worker - Worker: Primary page (RD_PRSN_PRIMARY) to view and update summary information for a worker.

Navigation:

- **Workforce > Search Worker > Primary**
- **Workforce > Add Worker**

Enter required information on the Add Worker pages and click the **Create Worker** button.

This example illustrates the fields and controls on the Worker - Worker: Primary page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Worker' primary page interface. At the top, there's a header with 'Worker' and a toolbar containing buttons like 'Save', 'Create from Current', 'Copy Data', '360-Degree View', and 'Personalize'. Below the header, a summary bar shows 'Name Mary Kumar' and 'Employee ID KU100'. A navigation bar includes tabs for 'Worker', 'Job', 'Work Schedule', 'Skills and Competencies', 'Assignment Criteria', and 'Groups'. Under the 'Worker' tab, there are sub-tabs for 'Primary', 'Details', and 'User Profiles'. The main section is titled 'Person Information' and contains several input fields: 'Salutation' (dropdown), '*First Name' (text, value: Mary), 'Middle Name' (text), '*Last Name' (text, value: Kumar), 'Suffix' (text), 'Employee ID' (text, value: KU100), 'Title' (text, value: Support Agent), 'Date of Birth' (calendar icon), 'Age' (text), and 'Gender' (dropdown). A 'More Names' link is at the bottom.

The Worker - Worker: Primary page and the Person - Primary page are identical in appearance and usage, except:

- The Worker - Worker: Primary page contains the employee ID and title.
- The Person - Primary page contains a setID.

Contact information entries and user-defined fields on the Worker - Worker: Primary page act the same as those on the Person - Primary page.

See Person (<Role>) - Person: Primary Page.

Worker - Worker: Details Page

Use the Worker - Worker: Details page (RD_PRSN_DETAILS) to view and maintain worker profile information.

Navigation:

Click the **Details** link on the Worker - Primary page.

This example illustrates the fields and controls on the Worker - Worker: Details page. You can find definitions for the fields and controls later on this page.

This page is similar in appearance and use to the Person - Details page, except:

- Only the **Profile Information** region appears on the worker page.
- On the worker page, the **Use as Template Worker** field enables you to make this worker's information available as a template for creating a worker.

See [Person \(<Role>\) - Person: Primary Page](#).

Worker - Worker: User Profiles Page

Use the Worker - Worker: User Profiles page (RD_PERSON_USER) to maintain the worker's user profile.

Navigation:

Click the **User Profiles** link on the Worker - Primary page.

This example illustrates the fields and controls on the Worker - Worker: User Profiles: User Summary page. You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360-Degree View | >> | Personalize

Name Mary Kumar **Employee ID** KU100

Worker | Job | Work Schedule | Skills and Competencies | Assignment Criteria | Groups |

Primary | Details | **User Profiles**

User Summary | Customize | Find | | | First | 1-2 of 2 | Last

User ID

KU100

<blank>

Add New User

This example illustrates the fields and controls on the Worker - Worker: User Profiles: User Information Detail page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Worker - Worker: User Profiles: User Information Detail' page. The 'User Profiles' sub-tab is active, showing 'Primary' and 'Details' views. The 'User Information Detail' section includes 'Logon Information' with fields for *User ID (KU100), *Password, and *Confirm Password. It also has 'Permission Lists' with 'Process Profile' and 'Primary' set to 'ALLPAGES', and a 'Locked Out?' checkbox. Below is a 'Contact Roles' table with columns for Role Name, Description, and actions (+, -). Roles include Account Administrator, Account Manager, Advisor Admin, Advisor IT Setup, Advisor User, CRM Dashboard Administrator, CRM Dashboard User, CTI Administrator, CTI Agent, Call Center Agent, Call Center Contact Us: clone, Call Center Manager, EOPP_USER (selected), Common Portal User, ERMS Agent, and ERMS Manager. At the bottom is an 'Additional User Setup' section with links for CRM User Preferences, CTI Agent Information, and MCF Agent Information.

A list of the user IDs that the worker is authorized to use appears in the **User Summary** region of this page. You can click a listed user ID to view and modify the details of the user ID or click the **Add New User** button to add a new user ID to the worker.

This page is similar in appearance and use to the Person - User Profiles page, except that the **Additional User Setup** region appears on the detail view of the page for workers in the GBL market.

Worker - Job: Job Details Page

Use the Worker - Job: Job Details page (RD_WORKER_DETAIL) to enter information about the specified worker's job.

Navigation:

Select the Job tab from any page in the Worker component.

This example illustrates the fields and controls on the Worker - Job: Job Details page. You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360-Degree View | >> Personalize

Name Mary Kumar Employee ID KU100

Worker Job Work Schedule Skills and Competencies Assignment Criteria Groups

Worker Role Employee Assignment Start 07/23/2009

Job Details Find | View All First 1 of 1 Last

| | |
|----------------------------------|-------------------------------------------|
| Effective Date 07/23/2009 | Effective Sequence 0 |
| Employee Status Active | HR Status Active |
| Job Indicator Primary | Source CRM |
| Reg/Temp Regular | Full/Part Time Full-Time |
| Job Code SetID SHARE | |
| Job Code KUC10 | Job Sr. Customer Service Rep |
| Department SetID SHARE | GL Business Unit |
| Department KU016 | Dept. Description Customer Service |
| Location SetID SHARE | |
| Location Code KUCA00 | Location California Location |
| Physical Location | |
| Time Zone PST | |
| Holiday Schedule 2002 | Schedule Year 2002 |
| Supervisor ID 300044 | Supervisor Angela Lucca |
| Officer Code None | Manager Level Non-Manager |

Add New Job Details

Audit History

[Return to Summary](#)

* Required Field

By default, job details for the currently active primary job for the worker appear on this page. All workers can scroll through and view historical, current, and future job information. When the worker has existing job data and requires new job data, for example, a new supervisor ID, job code, or location, you add a new job details row with the new information. By default, the new effective date is the current date.

All users can update and delete effective-dated future job rows within a job assignment as long as at least one effective-dated row for each job assignment remains. All users can view historical, current, and future job data.

Secured Worker Information

You can perform these functions only if your sign-in role has secured worker access:

- Modify historical and current-dated job information records.
- Delete historical and current job information records.
- Modify the worker's employee status.

- View the worker's HR (Human Resources) status. Examples of HR status are *Active*, *Retired*, and *Terminated*.

Job Information

| Field or Control | Description |
|--------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Worker Role | <p>Select the worker's role.</p> <p>The worker role indicates the worker's relationship to the organization. Values are <i>Employee</i> and <i>Contingent Worker</i>. This field is available only for the earliest job details record on an assignment.</p> |
| Effective Date | Enter the effective date of the current job details. When you add new job details, the current date appears by default. All workers can view present, current, and future job details. |
| Effective Sequence | <p>Sequences the order in which job detail records appear.</p> <p>When you add a new job details record, the system assigns it sequence number zero and increments the sequence numbers on the existing job details records by one. This is to ensure that job details appear in descending date order.</p> |
| Job Indicator | Indicates that this is the primary job for the assignment. When you add a new job record and mark it as primary, the system recalculates the primary job assignment indicator. |
| Source | Indicates the source of the job record. Values are <i>HCM</i> , indicating that the job information was imported from the HCM system and <i>CRM</i> , indicating that the information was entered in CRM. You cannot update job records that originated in the HCM system. |
| GL Business Unit (General Ledger business unit) | Enter the business unit that is used to account for the worker's costs on the general ledger. |
| Physical Location | Enter a description of the worker's physical location. You can use this field to specify locations such as an office or cubicle number. |
| Holiday Schedule | Select the holiday dates that are valid for this worker. |
| Supervisor ID | Select the supervisor to whom this worker reports. |

| Field or Control | Description |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| Officer Code | Select an officer code to identify highly compensated employees for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004). |
| Manager Level | Select the worker's management level, if applicable. |
| Return to Summary | Click this link to view the Job Summary page, which lists summary information about the worker's assignments. |

Entering Job Codes, Departments, and Locations

Job Code, Department, and Location Code are controlled by setID. You must enter the corresponding setID, and only values for the setID are valid. This information is defined when you set up worker foundational data.

Related Links

[Setting Up Foundational Data for Workers](#)

Worker - Job: Job Summary Page

Use the Worker - Job: Job Summary page (RD_ASGN_JOB) to view assignment summary information for the worker.

Navigation:

Select the Job tab from any page in the Worker component.

Scroll to the bottom of the Job Detail page and click the **Return to Summary** link.

This example illustrates the fields and controls on the Worker - Job: Job Summary page. You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360 360-Degree View | >> Personalize

Name Mary Kumar Employee ID KU100

Worker Job Work Schedule Skills and Competencies Assignment Criteria Groups

Job Summary

| Primary | Assignment Description | Current Job Date | Assignment Start | Assignment End | Role | Employee Status |
|-------------------------------------|------------------------------------------|------------------|------------------|----------------|----------|-----------------|
| <input checked="" type="checkbox"/> | Sr. Customer Service Rep | 07/23/2009 | 07/23/2009 | 12/31/2999 | Employee | Active |

Add Job Assignment

Use this page to view summary information from all the assignments the worker has had and drill down into the job details for any past, current, or future assignment. The system determines the assignment

start and assignment end date from the dates of the job detail records for the assignment. The system also determines the primary assignment for the worker

| Field or Control | Description |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add Job Assignment | Click to add a new job assignment. New job assignments are added with the <i>Hire</i> action/reason. When you add a new job assignment, the Job Details page appears. |

Worker - Work Schedule Page

Use the Worker - Work Schedule page (RD_WORKER_SCHEDULE) to define default workdays for the specified worker.

Navigation:

Select the Work Schedule tab from any page in the Worker component.

This example illustrates the fields and controls on the Worker - Work Schedule page. You can find definitions for the fields and controls later on this page.

Worker

Save

Create from Current

Copy Data

360 360-Degree View

>>

Personalize

Name

Mary Kumar

Employee ID

KU100

Worker

Job

Work Schedule

Skills and Competencies

Assignment Criteria

Groups

Time Zone

Time Zone

Pacific Time (US)

Scheduling Options

☒ Monday

Start

End

8:00AM

5:00PM

+

-

☒ Tuesday

Start

End

8:00AM

5:00PM

+

-

☒ Wednesday

Start

End

8:00AM

5:00PM

+

-

☒ Thursday

Start

End

8:00AM

5:00PM

+

-

☒ Friday

Start

End

8:00AM

5:00PM

+

-

☐ Saturday

Start

End

+

-

☐ Sunday

Start

End

+

-

View Calendar

When evaluating worker availability for assignments, the system checks standard work week information that you define for the worker on this page.

Select the default work days for the specified person. The **Start** and **End** fields define the default hours of operation for the person. Enter start and end times for each work period in the day. You can enter multiple work periods to represent lunch breaks, shifts, and so forth. By default, the system populates these values with the standard work week information that you define for the installation.

Worker - Skills and Competencies Page

Use the Worker - Skills and Competencies page (RD_WORKER_CMP_PROF) to associate the specified worker with a competency and define the worker's level of proficiency for the competency.

Navigation:

Select the Skills and Competencies tab from any page in the Worker component.

This example illustrates the fields and controls on the Worker - Skills and Competencies page. You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360 360-Degree View | >> Personalize

Name Mary Kumar Employee ID KU100

Worker Job Work Schedule Skills and Competencies Assignment Criteria Groups

Assigned Competencies Customize Find First 1-4 of 4 Last

| *Competency | *Proficiency |
|-----------------------------|----------------------|
| Repair Freezer | Certified Technician |
| Certified in Refrigeration | Yes |
| Customer Rep Experience | 5-Expert |
| Appliances Service & Repair | 1-Little |

Add Competency

Important! Before assigning competencies on the Worker - Skills and Competencies page in CRM, you must select the **Use Only Evaluation Type** installation option.

The Person Competency EIP loads competency data with all evaluation types into CRM. Although the evaluation type does not appear in CRM, CRM pages list only the competency records that match the specified evaluation type. If you do not specify an evaluation type during the installation, competency records for all evaluation types are available, which can degrade system performance.

| Field or Control | Description |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Description | Select a competency that is associated with the worker. In CRM, you establish competencies on the Competencies page under Set Up CRM > Common Definitions > Competencies . |

| Field or Control | Description |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Proficiency | Enter the worker's level of expertise for the competency. The rating model that is defined for the competency on the Competencies page determines the available proficiency values. In PeopleSoft FieldService, the system checks a worker's proficiency level for a competency to determine whether the worker is qualified to perform work on a service order that requires the competency. In PeopleSoft Support and PeopleSoft HelpDesk, the system checks a worker's proficiency level for a competency to determine whether the worker is qualified to perform work on a case that requires expertise in the problem type. |

Worker - Assignment Criteria Page

Use the Worker - Assignment Criteria page (RD_WORKER_CRITERIA) to define criteria that the assignment engine uses to match the specified worker to a case or service order.

Navigation:

Select the Assignment Criteria tab from any page in the Worker component.

This example illustrates the fields and controls on the Worker - Assignment Criteria page (1 of 2). You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360 360-Degree View | >> Personalize

Name Mary Kumar Employee ID KU100

Worker Job Work Schedule Skills and Competencies Assignment Criteria Groups

Region Customize Find

*Description
Northern California

Customer Customize Find

SetID *Customer Site

Product Customize Find

| *SetID | *Description | *Skill Level | | |
|--------|--------------------------------|----------------------|---|---|
| IPROD | 24.7 cu. Ft. Refrigerator w/Fc | Certified Technician | + | - |
| IPROD | 26.7 cu. Ft. Refrigerator w/Fc | Certified Technician | + | - |
| IPROD | 21.6 cu. Ft. Top Refrigerator | Certified Technician | + | - |
| IPROD | 22.8 cu. Ft. Chest Freezer Man | Certified Technician | + | - |
| IPROD | Custom Build Freezer Package | Certified Technician | + | - |
| IPROD | 14.8 cu. Ft. Chest Freezer Fla | Certified Technician | + | - |
| IPROD | 17.8 cu. Ft. Chest Freezer Man | Certified Technician | + | - |
| IPROD | 7.2 cu. Ft. Lab Freezer | Certified Technician | + | - |
| IPROD | Sectional Walk-in Freezer | Certified Technician | + | - |

This example illustrates the fields and controls on the Worker - Assignment Criteria page (2 of 2). You can find definitions for the fields and controls later on this page.

| Product Group | | Customize | Find | | |
|---------------|----------------|-----------|------|---|---|
| *SetID | *Product Group | | | | |
| IPROD | FREEZER | | | + | - |
| IPROD | REFRIDGE | | | + | - |
| IPROD | WALK-INS | | | + | - |
| IPROD | DISH-WASH | | | + | - |
| IPROD | DISPOSER | | | + | - |

| Person Type | | Customize | Find | | |
|--------------|-------------------|-----------|------|---|---|
| *Person Type | | | | | |
| | Contingent Worker | | | + | - |

| Location | | Customize | Find | | |
|----------|-----------------|-----------|------|---|---|
| *SetID | *Location | | | | |
| CRM01 | Winnipeg Office | | | + | - |

| Department | | Customize | Find | | |
|------------|--------------|-----------|------|---|---|
| *SetID | *Description | | | | |
| | | | | + | - |

| Security Role | | Customize | Find | | |
|-------------------|---------------------|-----------|------|---|---|
| *Role Description | | | | | |
| | Field Service Agent | | | + | - |

The system uses the values in the **Customer**, **Region**, **Product**, **Product Group**, **Location**, **Department**, and **Role** fields to evaluate how suitable a worker is for assignment to the service order, case, or change request task relative to other workers in the provider group.

When you perform an assignment search from a case, service order, or change request task, the assignment engine calculates a point value for each criteria value on the service order, case, or change request task that the worker matches based on the weight, or relative importance, of the match. The sum of the point values divided by the total possible points for the service order or case becomes the worker's fit score. Failure to match individual criteria lowers the worker's total fit score but does not exclude the worker from the list of suggested assignment candidates. Failure to match any criteria excludes the worker from the suggested candidates.

The assignment engine uses a different set of assignment criteria values for cases in PeopleSoft HelpDesk, cases in PeopleSoft Support, service orders in PeopleSoft FieldService, or tasks in PeopleSoft Change Management. For help desk cases, the assignment engine matches values for location, product, and product group. For both support cases and service orders, the assignment engine matches values for customer, site, region, product, and product group. For tasks in Change Management, the assignment engine matches values for location, department, either product or product group, and role.

Region

Enter the worker's region. The assignment engine matches the worker's region to the region on the service order or case.

Customer

If the worker can support the customer at any site, enter the customer and leave the **Site** field blank. You can also select a site without specifying a customer.

Product

The values for the **Proficiency** field depend on the product rating model that you specify for the setID when you set up the assignment engine.

Product Group

Enter the product groups that the worker supports and the setIDs of the product groups.

Location

Enter the worker's location and the location setID. The assignment engine matches the worker's location for change management tasks.

Department

Enter the worker's department and setID of the department.

Role

Enter the description of the worker's role. This is used to assign change management tasks to workers.

Worker - Groups Page

Use the Worker - Groups page (RD_WORKER_GROUPS) to associate the worker with provider groups and group worklists.

Navigation:

Select the Groups tab from any page in the Worker component.

This example illustrates the fields and controls on the Worker - Groups page. You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360-Degree View | >> Personalize

Name Mary Kumar Employee ID KU100

Worker Job Work Schedule Skills and Competencies Assignment Criteria **Groups**

Provider Group Membership Customize Find First 1-7 of 7 Last

| SetID | Provider Group Name | Status |
|-------|-------------------------------|--------|
| COM01 | Fraud Team | Active |
| IPROD | Complaint Services | Active |
| IPROD | Contact Us | Active |
| IPROD | Dishwasher/Appliance Support | Active |
| IPROD | Case Escalation | Active |
| IPROD | Freezer/Refrigeration Support | Active |
| IPROD | Self Service Cases | Active |

Add Group

Group Worklist Membership Customize Find First 1-9 of 9 Last

| User ID | Group Worklist Name | Owner |
|---------|-----------------------------|-------|
| KU100 | CaseEscalation-APP01 | |
| KU100 | ComplaintServices-APP01 | |
| KU100 | ContactUs-APP01 | |
| KU100 | Dishwasher/AppSupport-APP01 | |
| KU100 | Freezer/FridgeSupport-APP01 | |
| KU100 | IPROD_Complaints | |
| KU100 | IPROD_INVESTOR | |
| KU100 | OrderInquiry-APP01 | |
| KU100 | SelfServiceCases-APP01 | |

Add Worklist

Worker - Storage Locations Page

Use the Worker - Storage Locations page (RD_WORK_STORLOC) to define inventory storage locations that are associated with good and defective storage locations on a field service worker's truck.

Navigation:

Select the Storage Locations tab from any page in the Worker component.

This example illustrates the fields and controls on the Worker - Storage Locations page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Worker' page for Mary Kumar (Employee ID KU100). The 'Storage Locations' tab is selected, showing a table with the following columns: *Location Type, *IN Unit, *Area, Level 1, Level 2, Level 3, and Level 4. The 'Location Type' dropdown is set to 'Good'. The table has a 'First' button and a '1 of 1' indicator.

Storage location information is required only for workers who perform field service activities. Material movement transactions that are initiated from the Manage Material page in PeopleSoft FieldService update quantities in the inventory storage locations that are associated with the lead technician on the service order line.

You must define one and only one good truck stock location and one and only one defective truck stock location for each field service worker. The good and defective locations can't have the same storage location definition—the area and up to four storage levels—in PeopleSoft Inventory or a third-party inventory system.

| Field or Control | Description |
|-----------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Location Type | <p>Select the type of material location that is on the truck. Values are:</p> <p><i>Good:</i> The location for material that is used to complete a service request at a customer's site.</p> <p><i>Defective:</i> The location of material that was removed from a customer's site. Typically, the worker returns this stock to the central distribution center for inspection or scrap processing.</p> |
| IN Unit (inventory unit) | <p>Enter the identification of the inventory business unit with the material storage location that corresponds to the material location type that is on the worker's truck. You define the inventory business unit in PeopleSoft Inventory or a third-party inventory system and insert it in the CRM system by using the Business Unit EIP.</p> <p>See Understanding Enterprise Integration Technology.</p> |
| Area, Level 1, Level 2, Level 3, and Level 4 | <p>Enter the material storage area in PeopleSoft Inventory or a third-party inventory system that corresponds to the material location type that is on the worker's truck. You can define a storage location address in an inventory system by using a storage area and up to four levels representing a physical subdivision of the storage area, such as aisles, rows, shelves, and bins.</p> |

Important! No prompts are available for the storage location definition fields **Area**, **Level 1**, **Level 2**, **Level 3**, and **Level 4**. Unlike business units, storage location information is not synchronized with an inventory system. You must know the correct storage location definitions to enter. Material movement transactions that are initiated from the Manage Material page are successfully recorded in the inventory system only if the storage location definition that you enter is a valid storage location for the inventory business unit that is referenced in the **IN Unit** field.

See the product documentation for *PeopleSoft Inventory*.

Related Links

“Truck Stock Storage Locations” (PeopleSoft Integrated FieldService)

“Setting Up the Order Materials Component” (PeopleSoft Integrated FieldService)

Worker - Signature Page

Use the Worker - Signature page (RD_WORKER_WF_SIG) to define a default signature to use when the specified worker sends manual notifications.

Navigation:

Select the Signature tab from any page in the Worker component.

In the **Notification Signature** field, enter the default signature that is used when someone sends manual notifications. When this person clicks the **Notification** button from a transaction and accesses the Outbound Notification page, this signature appears in the **Message** field.

Setting Up Foundational Data for Workers

To set up foundational data for workers, use the Location (LOCATION_TBL), Department (DEPARTMENT), Job Code (RB_JOB_CODE), and Cost Category (RF_COST_CAT) components.

These topics discuss how to:

- Set up location codes.
- Set up department codes.
- Set up job codes.
- Set up cost categories.
- Set up competencies.

Note: In addition to worker-specific foundational data, worker records also reference general foundational data, such as setIDs, location codes, and salutation codes. For more information, refer to the table-loading sequence for the CRM application. You can find table-loading sequences for each product on the My Oracle Support web site.

Pages Used to Set Up Foundational Data for Workers

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---------------------------------------------|-------------------------------|----------------------------------------------------------|
| <u>Location Page</u> | LOCATION_TBL | Set up location codes. |
| <u>Department Page</u> | DEPARTMENT | Set up information about the organization's departments. |
| <u>Job Codes Page</u> | RB_JOB_CODE | Set up codes for the jobs in the organization. |
| <u>Cost Categories Page</u> | RF_COST_CAT | Set up cost categories. |
| Worker Function | RD_WRK_FUNC_TBL | Set up worker functions. |
| <u>Competencies Page</u> | COMPETENCY_TABLE | Set up competencies. |

Related Links

[Understanding Enterprise Integration Technology](#)

Location Page

Use the Location page (LOCATION_TBL) to set up location codes.

Navigation:

Set Up CRM > Common Definitions > Location > Location

Department Page

Use the Department page (DEPARTMENT) to set up information about the organization's departments.

Navigation:

Set Up CRM > Common Definitions > Employee Data > Employee Department > Employee Department

This example illustrates the fields and controls on the Department page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Department Information' page. At the top, there are tabs for 'SetID CRM01', 'Department TEST', and 'Location'. Below the tabs is a header bar with 'Find | View All', 'First', '1 of 1', and 'Last'. The main form area contains the following fields and controls:

- *Effective Date:** A date field with the value '09/15/2002' and a calendar icon.
- *Status:** A dropdown menu with the value 'Active'.
- *Description:** A text field with the value 'Human Resource'.
- Short Description:** A text field with the value 'HR'.
- Manager EmplID:** A text field with a magnifying glass icon.
- Manager Name:** A text field.

Note: Instead of entering information directly into CRM, you can maintain department codes in PeopleSoft HCM or a third-party system and move the department data to CRM by implementing the Department Table EIP.

Job Codes Page

Use the Job Codes page (RB_JOB_CODE) to set up codes for the jobs in the organization.

Navigation:

Set Up CRM > Common Definitions > Employee Data > Job Codes > Job Codes

This example illustrates the fields and controls on the Job Codes page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Job Codes' page. At the top, there are tabs for 'SetID CRM01' and 'Job Code TEST'. Below the tabs is a header bar with 'Find | View All', 'First', '1 of 1', and 'Last'. The main form area contains the following fields and controls:

- *Effective Date:** A date field with the value '09/15/200' and a calendar icon.
- *Status:** A dropdown menu with the value 'Active'.
- *Description:** A text field with the value 'Human Resource Analyst'.

You can also maintain job codes in PeopleSoft HCM or a third-party system and move the job code data to CRM by implementing the Job Code Table EIP.

Cost Categories Page

Use the Cost Categories page (RF_COST_CAT) to set up cost categories.

Navigation:

Set Up CRM > Common Definitions > Employee Data > Cost Categories > Cost Categories

This example illustrates the fields and controls on the Cost Categories page. You can find definitions for the fields and controls later on this page.

Cost Categories

SetID CRM01

Cost Categories Personalize Find View All | First 1-6 of 6 Last

| *Cost Category Code | *Description | Short Description | |
|---------------------|---------------|-------------------|--|
| AFTR | After Hours | After Hour | |
| DOUB | Double Time | Double | |
| HALF | Time and Half | 1.5 | |
| PAGER | Pager | Pager | |
| STRT | Straight Time | Straight | |
| TRAVL | Travel | Travel | |

Add Cost Category

Competencies Page

Use the Competencies page (COMPETENCY_TABLE) to set up competencies.

Navigation:

Set Up CRM > Common Definitions > Competencies > Competencies > Competencies

This example illustrates the fields and controls on the Competencies page. You can find definitions for the fields and controls later on this page.

Competencies

Competency ID 1208

*Description Network Repair

Short Description NW Rpr

*Rating Model PSCM Competency Management Scale

Comments Repair of IT Network

Competency Types Personalize Find First 1 of 1 Last

| Type | Description | |
|-------|-----------------------|--|
| HARDW | Hardware and Networks | |

Worker competency information determines which workers are best qualified for assignment to a case or service order. CRM enables you to define competency information and associate it with workers by using competency codes. You can also maintain competency data in PeopleSoft HCM or a third-party system

and move the competency data to CRM by implementing the following EIPs: Competency Type, Rating Model, and Competency.

Working with Predefined Business Object Search and Quick Create Data

Understanding Delivered System Data for BO Search and Quick Create

This topic discusses the following delivered system data:

- Field definitions.
- Quick create definitions and templates.
- Search roles.
- Search definitions.
- Criteria fields.
- Adapter definitions.

Delivered System Data

PeopleSoft CRM delivers system data for business object searches and quick create definitions that are delivered as part of the PeopleSoft CRM suite of products. Before defining new searches or quick create definitions, examine the delivered system data to fully understand the setup requirements.

See [Understanding BO Search and Quick Create Setup](#).

Field Definitions

This topic provides a summary list of the fields that are provided by PeopleSoft CRM. For more detail on how a field is defined in the system, access the Field page and search for the field description.

See [Field Page](#).

| Field Description | Field Name | Role Types |
|--------------------------|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account | RBTACCTNO | <ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9) • Account Owner (Individual) (65) • Account Owner (Organization) (66) • Account Owner (Rep.) (67) |
| Account ID | RBTACCTID | <ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9) • Sold To Organization (42) • Sold To Individual (46) • Account Owner (Individual) (65) • Account Owner (Organization) (66) • Account Owner (Rep.) (67) |
| Address Address 1 | CO_CONCAT ADDRESS 1 | <ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88) |
| AGREEMENT ID | AGREEMENT_CODE | <ul style="list-style-type: none"> • Company (2) • Contact (8) • Individual Consumer (9) |

| Field Description | Field Name | Role Types |
|--------------------------|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Birthday | BIRTHDATE | <ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9) |
| City | CITY | <ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88) |
| Country | COUNTRY | <ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88) |
| Created by | ROW_ADDED_OPRID | Worker(4) |

| Field Description | Field Name | Role Types |
|--------------------------|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Created Date | ROLE_START_DT | Worker(4) |
| Currency | CURRENCY_CD | <ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) |
| Customer ID | CUST_ID | <ul style="list-style-type: none"> • Company (2) • Individual Consumer (9) |
| Department Name | DESCR | <ul style="list-style-type: none"> • Worker (4) • Person of Interest (88) |
| Email | CM_CONCAT | <ul style="list-style-type: none"> • Worker (4) • Contact (8)) • Individual Consumer (9) • Account Owner (Individual) (65) • Account Owner (Rep.) (67) • Person of Interest (88) |
| Employee ID | EMPLID | <ul style="list-style-type: none"> • Worker (4) • Person of Interest (88) |
| Extension | EXTENSION | Worker (4) |

| Field Description | Field Name | Role Types |
|--------------------------|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| First Name | FIRST_NAME | <ul style="list-style-type: none"> • Worker (4) • Contact (8) • Individual Consumer (9) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88) |
| Last Name | LAST_NAME | <ul style="list-style-type: none"> • Worker (4) • Contact (8) • Individual Consumer (9) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88) |
| Location Name | RC_LOC_DESCR | <ul style="list-style-type: none"> • Worker • Person of Interest (88) |

| Field Description | Field Name | Role Types |
|--------------------------|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name | BO_NAME_DISPLAY | <ul style="list-style-type: none"> • Person (1) • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88) • Organization (20008) |
| National ID | NATIONAL_ID | <ul style="list-style-type: none"> • Contact (8) • Individual Consumer (88) • Worker (4) • Person of Interest (88) |

| Field Description | Field Name | Role Types |
|--------------------------|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Phone | CM_CONCAT | <ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88) |
| Physical Location | PHYSICAL_LOCATION | Worker (4) |
| PIN | PERSON_PIN | <ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9) |
| Postal | POSTAL | <ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88) |

| Field Description | Field Name | Role Types |
|--------------------------|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Serial Number | SERIAL_ID | <ul style="list-style-type: none"> • Company (2) • Contact (8) • Individual Consumer (9) |
| Service Phone | RBTPHONENUMBER | <ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9) |
| SIN | SIN | <ul style="list-style-type: none"> • Company (2) • Site (3) • Individual Consumer (9) |
| Site ID | SITE_ID | Site (3) |
| SSN/TIN | TIN | <ul style="list-style-type: none"> • Company (2) • Site (3) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) |
| State | STATE | <ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88) |

| Field Description | Field Name | Role Types |
|--------------------------|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Stock Symbol | STOCK_SYMBOL | Company (2) |
| Suffix | NAME_SUFFIX | Worker (4) Contact (8) Individual Consumer (9) Ship To Individual (45) Sold To Individual (46) Bill To Individual (47) |
| TIN Type | TINTYPE | <ul style="list-style-type: none"> • Company (2) • Site (3) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) |

Quick Create Definitions and Templates

Refer to the Quick Create search page for a list of system delivered quick create definitions and templates.

See [Template Page](#), [Quick Create Page](#).

Search Roles

Refer to the Search Role search page for a list of system delivered search roles.

See [Role Page](#), [Search Role Page](#).

Search Definitions

Refer to the (BO) Search search page for a list of system-delivered search definitions.

See [Search Page](#).

Criteria Fields

Refer to the Criteria search page for a list of system-delivered criteria fields.

See [Criteria Page](#).

Adapter Definitions

Refer to the Adapter search page for a list of system-delivered adapters.

See [Sections Page](#), [Adapter Page](#).

Using Business Object Search and Quick Create Functionality

Understanding the Business Object Search and Quick Create Process

These topics discuss:

- Business object search.
- Customer identification.
- Quick create functionality.
- BO search and Quick Create runtime example.

Business Object Search

When users create a transaction in PeopleSoft CRM and do not know the specific value for a business object that the transaction uses, they can invoke a business object search to find the field value. The system determines the information that is needed depending on the page where the business object search was initiated and searches for the business object.

If the business object is not uniquely identified from the information that the user enters, a search page that contains both a list of objects that are potential matches and additional search fields appears.

Related Links

[Understanding Delivered System Data for BO Search and Quick Create](#)

[Customer Information Subpage](#)

[Adding and Modifying BO Search and Quick Create Definitions](#)

Customer Identification

The customer identification framework uses business object search to provide an easy and consistent way to identify the customer—company, consumer, contact, or site—for a transaction.

Each transaction page has one or more subpages that contain the fields for entering customer, contact, and other information such as phone, site, identification number, or account number.

The subpages that appear and fields that appear on each subpage vary depending on the information that each transaction needs. For example, the customer information fields for order capture are **Customer**, **First Name**, and **Last Name** while the fields for creating a support case are **Company**, **First Name**, **Last**

Name, and **SIN** (Service Identification Number). The customer information subpage might have one or two columns, depending on the needs of the page layout.

The user enters information in one or more fields and initiates a search. If a business object that uniquely matches the criteria that are entered is found, it is returned to the customer information subpage. If not, a page containing additional search criteria and a list of potential matches appears. The user can:

- Select a record.
- Refine the search criteria and search again.
- Create a new object using quick create.

Quick Create Functionality

The quick create functionality in PeopleSoft CRM enables users to create business objects quickly and easily without navigating to the business object components. This functionality is available either from within a PeopleSoft CRM application or by using the standalone Quick Create component.

Quick create definitions that are set up in the system and associated with transactions enable users to enter the subset of business object information that is required to define a business object and save it to the database. The business object information that is created is returned to the application so that the business process can continue. Some quick create definitions are set up to create more than one business object and the relationships between the business objects at the same time. For example, the *The Company with Contact* definition creates both a company and a contact.

You access the Quick Create component:

- As a standalone component by selecting Customers CRM.
- From the business object search page within a PeopleSoft CRM transaction.
- Directly from a PeopleSoft CRM application component, such as the Create Order transaction.

BO Search and Quick Create Runtime Example

For example, a call center agent might receive a call from a contact named Larry Hill who represents a customer company named MMA Property Management. The agent opens a case and searches for a company name of MMA with a last name of Hill.

If the information that the agent enters does not uniquely identify a customer and contact, the advanced search page appears. This page contains both expanded search criteria fields and a search results section that lists all companies whose name begins with the letters MMA that are represented by a contact with a last name of Hill. The agent can then:

- Select the correct company and contact combination.
- Enter additional search criteria, and search again.
- Define a new company with contact.

This option uses the quick create feature.

BO Search System Processing

The following tasks occur without the user being aware of them:

- The transaction adapter determines, based on the transaction, what fields appear on the customer information subpage and the criteria definition that defines the advanced search page.
- The criteria definition determines what criteria fields appear on the advanced search page, how they appear, and the search definitions to invoke.
- The search definition determines the roles to search for the criteria fields, the fields that appear in the search results, how the search results appear, and the quick create definition that the user accesses to create a new business object.
- For each role that is searched, the search role determines the security that is applied, the relationships for the role, and whether fields appear in the search criteria or results that are set for the role.
- The field definitions determine how the search fields appear on the page, the database records that are searched for each field, and how the user can search for the field.

Quick Create System Processing

The following tasks occur without the user being aware of them:

- The quick create definition determines which quick create templates to display to the user.
- The quick create template definitions determine both the fields that appear on the quick create page and the criteria that are used to search for existing objects of the type that is defined.

Related Links

[Understanding Delivered System Data for BO Search and Quick Create](#)

Searching for Business Objects

These topics discuss how to:

- Identify customers for transactions.
- Search for business objects.

Pages Used to Search for Business Objects

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|------------------------------------------------|------------------------|--------------------------------------------------------------|
| Search For <object> Page | RBQ_BOSRCH | Search for a business object in the PeopleSoft CRM database. |

Customer Information Subpage

Access the customer information subpage on any transaction that is enabled for customer identification.

Note: The example shown is from the Add Case component. The fields that appear in the **Customer Information** page region are specific to Case searches. Other components that use this feature function similarly, although the fields might vary.

This example illustrates the fields and controls on the Case page. You can find definitions for the fields and controls later on this page.

Enter any information that you know and click **Search**. If the customer is not uniquely identified by the information that you enter, an advanced search page appears. You can also click the **Advanced Search** link to access the Search for <object> page.

Advanced Search

When you initiate the advanced search, the Search for <object> page appears. This page enables you to refine the search fields that you enter on the customer information subpage. This page contains additional search criteria and, depending on how the search criteria are set up, a link that accesses a quick create page to create a new business object or objects.

Search For <object> Page

Use the Search For <object> page (RBQ_BOSRCH) to search for a business object in the PeopleSoft CRM database.

Navigation:

- **Customers CRM > Business Object Search**
- Enter customer information in any **Customer Information** group box on a transaction.
- Click the **Advanced Search** link on any page that is enabled for BO search.
- Click the search icon next to any field on a PeopleSoft CRM component or on transaction pages that are enabled for BO search.

This example illustrates the fields and controls on the Search For Customer page . You can find definitions for the fields and controls later on this page.

Search For Customer

Search

Company

begins with

First Name

begins with

Last Name

begins with

Hill

Phone

begins with

Email

=

Address

begins with

City

begins with

State

=

Postal

=

Country

=

PIN

=

SIN

=

Serial Number

=

Agreement ID

=

Search

Clear

Cancel

Select Action

Create Company With Contact

Go

Search Results

| Last Name | First Name | Company | Consumer Last Name | Consumer First Name |
|----------------------|-----------------------|---------------------------|--------------------|---------------------|
| Hill | Kelly | | Hill | Larry |
| Hill | Larry | | | |
| Hill | Larry | Sparkle Clean Laundromats | | |

This page is identical to the advanced search pages that appear for customer identification. This page contains additional search criteria. In the example above, the user can create a new company with a contact.

| Field or Control | Description |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Select Action | <p>Select a listed action and click Go to access a Quick Create page where you can create a new business object of the type for which you are searching.</p> <p>This field appears only if the quick create option is defined for the business object search that you initiated. The available actions are also determined by the business object search definition. If there is only one quick create option defined for the search, then a link to the Quick Create page appears.</p> |

Search Results

If more than one business object meets the search criteria, the **Search Results** grid appears. The results are either:

- Single-select.

With single-select, one and only one business object can be returned from the search. The results appear in a list with each item identified as a link. When you click the link, the item is returned to the field from which the search was initiated.

- Multi-select.

With multi-select, more than one business object can be returned from the search. A check box appears next to each item. You select the desired items or click the **Check All/Clear All** link, then click the **Select** button to return the items to the calling page, where they appear in a grid.

Creating Business Objects by Using the Quick Create Component

This topic discusses how to create business objects by using quick create functionality.

Note: The functionality of the Quick Create page is flexible and enables you to create as many business objects as you want without leaving the page.

Page Used to Create Business Objects by Using Quick Create Functionality

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-----------------------------------------------|------------------------|--------------------------|
| Create <Quick Create Definition Name> Page | RBQ_QCREATE | Create business objects. |

Create <Quick Create Definition Name> Page

Use the Create <quick create definition name> page (RBQ_QCREATE) to create business objects.

Navigation:

- **Customers CRM > Quick Create > Quick Create**
- Click the link or **Go** button next to the **Create New** field on the business object lookup page.
- Click the **Create New** button on a PeopleSoft CRM application page.

This example illustrates the fields and controls on the Example of creating company contacts on the Creating Company with Contact page (1 of 2). You can find definitions for the fields and controls later on this page.

Create Company with Contact

*SetID SHARE

Company

[Search Existing Company](#)

*Name

*Currency

Purchasing Options

☒ **Sold To Customer** This company can make purchases.

☒ **Bill To Customer** This company can receive bills.

☒ **Ship To Customer** This company can receive shipments.

Contact Info Entries

Contact Info

*Description

| Phone | Country Code | Number | Ext/PIN |
|---------------------------------------------|----------------------|----------------------|----------------------|
| *Type <input type="text" value="Business"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Cellular"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="FAX"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Pager"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Email

| *Type | Email Address |
|---------------------------------------|----------------------|
| <input type="text" value="Business"/> | <input type="text"/> |
| <input type="text" value="Other"/> | <input type="text"/> |

Address

[Look up Address](#) [More...](#)

*Type

*Country

Address 1

Address 2

Address 3

City

County

State

Postal

This example illustrates the fields and controls on the Example of creating company contacts on the Creating Company with Contact page (2 of 2). You can find definitions for the fields and controls later on this page.

These screenshots show the quick create page for the Company with Contact definition. Most quick create pages look identical for they use common group boxes and fields to collect information. Some pages contain additional fields to capture data that is specific to the corresponding business objects.

Refer to the Defining Person Business Objects topic for field descriptions of these common group boxes and fields.

| Field or Control | Description |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SetID | Enter the setID for the objects that you are creating. This field appears only for objects that are controlled by a setID and is defined on the quick create definition. |

| Field or Control | Description |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Search Existing <BO> | Click this link to search for existing business objects that match the search criteria that you entered. For example, if you enter a company name of <i>MMA</i> , you can search for existing companies whose names start with MMA. This helps to ensure that you do not enter duplicate data for business objects that already exist in the system. |
| POI Type | <p>Select a type for the person of interest. This field is available only when you create POIs.</p> <p>Available values come from on the Person of Interest Type page. Typically, POI types are synchronized from HCM for use in CRM through the PERS_POI_SYNC EIP. If you wish you create new POI types in CRM, it is recommended that you first create the POI type in your HCM system and synchronize it to CRM.</p> |
| Description | Enter the description (if default value is not suitable) for the contact information you entered. This is required only if you have entered contact information. |
| Country | Fields in the Address group box can change depending on the country you select as part of the address, so that the right information can be captured in the format as required by specific countries. |
| Look up Address | Search an existing address that you can reuse for this business object you are creating. Enter at least one search criterion. For example, you are creating a POI for a woman who are calling to log a case. Since his husband works in the company, the agent maybe able to use his address that already exists in the system as hers. |
| Apply Changes | Click to save updates you have made to the Contact Info Entries section. When you click this button, two links appear: Create Entry and Delete Entry, which allow you to perform these actions as needed. |

Quick Create Process upon Save

When you save the Quick Create page, the system:

1. Verifies that all *required* fields are present.

If not, then the system returns an error message.

2. Creates the business object for each role that is present on the Quick Create page that has data.

For example, if the Quick Create page enables you to create a company and contact, but entering a contact is optional, then you can create a company without a contact. The contact is created only if you also enter contact data.

3. Creates the relationship between multiple roles if the information for these roles is present and the relationship between these roles is set up in the quick create template.

For example, if the quick create template enables you to create a company and a contact for the company at the same time, and also has a relationship set up between the two roles on the template, then when you enter the different roles and their information on the Quick Create page, both the company and the contact are created and the contact is linked to the company.

4. Returns newly created data to the calling application if you access the Quick Create page from a PeopleSoft CRM application.

If you are in the standalone Quick Create component, then you remain on the Quick Create page after you save.

Related Links

[Understanding Persons](#)

[Create Worker Page](#)

Setting Up Business Object Search and Quick Create

Understanding BO Search and Quick Create Setup

These topics lists common elements and discuss:

- BO search runtime process.
- Quick create runtime process.
- BO search and quick create setup process.

Common Elements for BO Search and Quick Create Setup

| <i>Field or Control</i> | <i>Description</i> |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Field | <p>Search fields are common objects that are used in BO search and quick create definitions. A field definition specifies the location of the field in the database, how the system searches for the field, the label of the field on the user interface, and how the field is updated by quick create.</p> <p>Fields are used in the following BO search and quick create elements:</p> <ul style="list-style-type: none">• Search roles.• Search definitions.• Search criteria.• Transaction adapter.• Quick create templates. |
| Quick Create Template | <p>A quick create template associates the fields that are entered with the business object roles that are updated when a user creates a business object using quick create. The criteria definition specifies the search criteria page on which quick create definitions that this template is associated with appear.</p> |
| Quick Create Definition | <p>A quick create definition is composed of one or more templates that appear to the user when the quick create definition is invoked. You can use the same quick create template in more than one definition.</p> |

| Field or Control | Description |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Search Role | <p>A search role definition associates field definitions to one or more role type. When user search for a field, only business objects that have a role that is associated with the field are returned in the search results.</p> <p>Search roles are used in search definitions.</p> |
| Search Definition | <p>A search definition is a collection of search roles and quick create definitions. Search definitions specify the roles and fields that are searched for data that a user enters. If you specify a quick create definition on the search definition, then the quick create definition is enabled on the search results page.</p> <p>You use search definitions in search criteria.</p> |
| Search Criteria | <p>Search criteria specify the search definitions that are invoked when the user enters data in certain fields on a component. You can specify a default search definition and up to four alternate definitions. You then select fields and associate each field with one or more search definitions. If you do not select a search definition for the field, then the default search definition is used.</p> <p>You associate criteria definitions with adapter sections.</p> |
| Adapter | <p>The adapter specifies the BO search definitions and quick create definitions that are enabled for a particular component or transaction. The adapter also defines the fields that appear in basic search mode, the search criteria to invoke for these fields, and the subpages of the component upon which these fields appear. Adapter sections are embedded into CRM applications.</p> |

BO Search Runtime Processes

PeopleSoft Customer Relationship Management (PeopleSoft CRM) provides the capability for users to search for business objects that they need to reference on transactions or components. When users don't know the exact name of the business object to reference, they can initiate a BO search to find the business object based on any information that they might know. The system determines the information that it requires to locate the BO and presents a search page for the user to enter known information.

The customer identification framework also uses BO search technology without the user having to explicitly initiate a search.

When a user searches for an object that does not already exist in the system, some PeopleSoft CRM transactions provide quick create functionality that enables the user to create that object with a minimum set of data. For example, when a contact calls for service on behalf of a company, the customer service representative (CSR) verifies the contact's information by doing a BO search for the contact. If the contact is not found in the database, the CSR can create a contact immediately and associate it to the company.

BO search and quick create functions are tightly integrated with each other, and they use much of the same system data.

Related Links

[Understanding the Business Object Search and Quick Create Process](#)

[Customer Information Subpage](#)

BO Search and Quick Create Setup

This is the BO search and quick create setup process:

1. Define search fields.
2. Define quick create templates.
3. Enter a quick create definition.
4. Define search roles.
5. Enter a search definition.
6. Define search criteria.
7. Define the BO search and quick create adapter.

Note: Setting up BO search and quick create definitions requires a good understanding of roles and relationships in the system.

Related Links

[Business Object Relationship Modelling](#)

Delivered Definitions

PeopleSoft CRM delivers a robust set of predefined system data that meets most business requirements. Search the delivered definitions before attempting to modify or add new business object search or quick create definitions. To search the delivered definitions, access the setup component for that definition and run a search without entering search criteria. A list of all defined items appears.

Important! PeopleSoft does not support changes that you make to the search definitions delivered with PeopleSoft CRM. Implementation of any new search definitions that you create requires a coding effort, which is also not supported by PeopleSoft.

Related Links

[Understanding Delivered System Data for BO Search and Quick Create](#)

Adding and Modifying BO Search and Quick Create Definitions

These topics discuss how to:

- Define fields.
- Define roles for a field.
- Define quick create templates.
- Define relationships for a template.
- Set up quick create definitions.
- Associate search fields with a role type.
- Define BO searches.
- Define search criteria fields.
- Specify basic search criteria fields.
- Define fields for transaction subpages.

Pages Used to Add or Modify Search Definitions

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---------------------------|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Field Page</u> | RBQ_FLDDFN | Define a field that is used in BO Search and quick create definitions. |
| <u>Role Page</u> | RBQ_FLDDFN_RL | View the roles that use the field definition. Each role that uses the field definition can override certain information that is defined for the field. |
| <u>Search Record Page</u> | RBQ_FLDDFN_REC | Specify characteristics of the record that is searched. |
| <u>Template Page</u> | RBQ_QCTMPL | Define a quick create template. This defines the business object roles that appear on the Quick Create page when quick create is initiated from a specific component. |
| <u>Relationships Page</u> | RBQ_QCTMPL_REL | Define the relationships between the roles defined on the quick create template. |
| <u>Quick Create Page</u> | RBQ_QCDFN | Set up a quick create definition and associate one or more quick create templates to it. |
| <u>Search Role Page</u> | RBQ_SRCHRL | Associate search fields with a role type. |

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------|-------------------------------|-----------------------------------------------------------------------------------|
| <u>Search Page</u> | RBQ_SRCHDFN | Define a BO search with one or more search roles, search fields, and related BOs. |
| <u>Criteria Page</u> | RBQ_CRITDFN | Specify the advanced search criteria fields and advanced search definition. |
| <u>Adapter Page</u> | RBQ_ADPTR | Specify the basic search criteria fields. |
| <u>Sections Page</u> | RBQ_ADPTR_SECT | Define the records and fields that appear on transaction subpages. |
| Labels | RBQ_ADPTR_LBL | Define labels. |

Field Page

Use the Field page (RBQ_FLDDFN) to define a field that is used in BO Search and quick create definitions.

Navigation:

Set Up CRM > Common Definitions > Customer > BO Search > Field > Field

This example illustrates the fields and controls on the Field page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Field' configuration page with the following sections:

- General Options:**
 - *Field Name/Label: Name
 - Field: BO_NAME_DISPLAY
 - Secondary Field: BO_NAME
 - Default: [Dropdown]
 - Alternate Character Field: Alt Char Name
 - Mapping Reference: BO_NAME
 - Field Upper: BO_NAME_DISP_UPPER
 - Secondary Field Upper: BO_NAME_UPPER
 - Parser: [Dropdown]
 - ☐ Is Related Language Field
 - ☐ Is Alternate Character Field
 - ☒ Is Name Field
 - Save As button
- Display Options:**
 - Display Field: [Text Box]
 - ☐ Display as Checkbox
- Search Operators:**
 - *Default Operator: begins with
 - ☒ Allow Equals
 - ☐ Allow Not Equal
 - ☒ Allow Begins With
 - ☒ Allow Contains
 - ☐ Allow Greater Than
 - ☐ Allow Greater Than or Equal
 - ☐ Allow Less Than
 - ☐ Allow Less Than or Equal
- Quick Create Keystokes:**
 - Name Field: NAME
 - Contact Info Field: [Text Box]

The purpose of a field definition is to ensure that the same value is propagated across different BO search and Quick Create definitions. If the field is constrained by role type, the value is propagated across only the definitions for this role type. For example, the value that is entered on a transaction is propagated to the search criteria then to the Quick Create template. Field definitions are referenced either directly or indirectly in all BO Search and Quick Create definitions.

A field definition specifies:

- The location of the field in the database.
- How the system searches for the field.
- The label of the field on the user interface.
- How Quick Create updates the field.

General Options

The system uses the values you enter in this region to format the BO search and Quick Create pages for the field, to process values that are entered for the field, and to compare entries against the database for duplicates.

| Field or Control | Description |
|----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Field Name/Label | Enter text that appears for the field on the user interface. The text appears both as a search criteria value that the user can select and as a column in the list of results returned by the search. |
| Mapping Reference | Enter the name that is used by the adapter to refer to the field in the component buffer. |
| Field and Secondary Field | Enter the names of the fields that the system searches for values that the user enters at runtime. The system searches the secondary field only if it doesn't find a match in the first field entered. |
| Field Upper and Secondary Field Upper | For fields of data type String, enter the names of the upper case fields that corresponds to the Field and Secondary field. This significantly improves performance when not using a case sensitive search. |
| Default | Select <i>Country</i> , <i>Currency</i> , <i>Language Code</i> or <i>SETID</i> . If selected, the corresponding value that is specified in the preferences for the user is inserted into the record at runtime by default. |
| Parser | Select the method to use to convert data that is entered in the field. For example, <i>Unformatted</i> converts (925) 694-44249 into 9256944249. |
| Alternate Char Field | Select the alternate character field that appears when the user ID is enabled for alternate character. |
| Is Related Language Field | Select to force translation of the field values to the user's language if the user is logged on with a language other than the base language. |
| Is Alternate Character Field | Select to indicate that the field is alternate character-enabled. |
| Is Name Field | Appears for the Name field definition only and is selected by default. You cannot deselect this option, nor can you add it to other field definitions. The Name field identifies the business object. The Is Name Field indicator facilitates processing by keeping the business object name in memory. |

Display Options

The entries in this page region control how the field appears on pages at runtime.

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Display Field | Enter the name of the field that is used to display the values at runtime. |
| Display as Checkbox | Indicate that this field appears as a check box for display and entry. The <i>Y</i> and <i>N</i> values in the field are translated at runtime into the appropriate check box property (selected or not selected). |

Search Operators

Select the default search operator and the search operators that are visible to the user when this field is searched.

Quick Create Keystrokes

Select the quick create field name(s) to which the field maps. If the field is entered as search criteria, and the search is unsuccessful, then system pre-populates the quick create field with the value that was entered as a search field.

Role Page

Use the Role page (RBQ_FLDDFN_RL) to view the roles that use the field definition.

Each role that uses the field definition can override certain information that is defined for the field.

Navigation:

Set Up CRM > Common Definitions > Customer > BO Search > Field > Role

This example illustrates the fields and controls on the Role page. You can find definitions for the fields and controls later on this page.

FieldRoleSearch Record

Field Name/LabelName

Role Options

CustomizeFind1-17 of 17Last

| *Role Type | Label | Property Name | | |
|----------------------|--------------------|---------------|---|---|
| Person | Sender | | + | - |
| Company | Company | | + | - |
| Site | Site | | + | - |
| Worker | Employee | | + | - |
| Contact | Contact | | + | - |
| Individual Consumer | Consumer | | + | - |
| Partner | Partner Company | | + | - |
| Partnership | Partnership | | + | - |
| Alternate Capacity | Alternate Capacity | | + | - |
| Ship To Organization | Ship To Company | | + | - |
| Sold To Organization | Customer | | + | - |
| Bill To Organization | Bill To Company | | + | - |
| Ship To Individual | Ship To Consumer | | + | - |
| Sold To Individual | Sold To Consumer | | + | - |
| Bill To Individual | Bill To Consumer | | + | - |

Use this page to indicate different role options for search fields. If the field is used by different role types, you can specify a different label to appear next to the field for each different role type. You can also specify a different property that is set for each role. The specifications you make on this page override the ones that you made on the Field page.

| Field or Control | Description |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Role Type | Select a role type that is valid for this field. The system uses the role type to identify objects for which the field can be used as search criteria. |
| Property Name | Select a property name for this role. Quick create updates the property with the value that users enter in the corresponding field when they create a new business object using quick create functionality. |

Search Record Page

Use the Search Record page (RBQ_FLDDFN_REC) to specify characteristics of the record that is searched.

Navigation:

Set Up CRM > Common Definitions > Customer > BO Search > Field > Search Record

This example illustrates the fields and controls on the Search Record page. You can find definitions for the fields and controls later on this page.

| Field Name/Label | Name | Role Options | Customize | Find | First | 1 of 1 | Last |
|------------------|----------------|----------------|---------------|---------------|--------|--------|------|
| Role Type | *Search Record | Search By Role | Search By Rel | Bypass Status | Secure | | |

This page enables you to define how searches for role-specific fields are performed.

| <i>Field or Control</i> | <i>Description</i> |
|-----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Role Type | Enter the role type to which the search options apply. If no role type is entered, the options on this line apply to all role types. |
| Search Record | Enter the name of the database record where BO Search looks for the field to display. |
| Search By Role | Select search only views that contain both the BO_ID (business object identifier) and ROLE_TYPE_ID (role type identifier) fields. |
| Search By Rel (Search By Relationship) | Select to search only views that contain both a BO_ID_1 and BO_ID_2 field. |
| Bypass Status | Select to search all values of the contact information. If this check box is not selected, only the current values for all fields in the contact record are searched. |

Template Page

Use the Template page (RBQ_QCTMPL) to define a quick create template.

This defines the business object roles that appear on the Quick Create page when quick create is initiated from a specific component.

Navigation:

Set Up CRM > Common Definitions > Customer > BO Search > Quick Create Template > Template

This example illustrates the fields and controls on the Template page (1 of 2). You can find definitions for the fields and controls later on this page.

Template

Relationships

Quick Create Template

*Description

The Company with Contact

Label

Company with Contact

*Market

Global

Save As

Role Options

FindFirst1-2 of 2Last

Role Type

Company

Label

Company

Criteria

The Company

☐ Include Purchasing Options

Purchasing Options

☐ Sold To Customer

☐ Bill To Customer

☐ Ship To Customer

☒ Include Contact Info Entry

Field Selection

| Field Definition | Display Type | | |
|------------------|--------------|--|--|
| Currency | Required | | |

This example illustrates the fields and controls on the Template page (2 of 2). You can find definitions for the fields and controls later on this page.

Role Type

Contact

Label

Contact

Criteria

The Person

☐ Apply Controlling BO

☒ Include Contact Info Entry

Field Selection

| Field Definition | Display Type | | |
|------------------|--------------|--|--|
| | | | |

Quick Create templates associates the fields that are entered on Quick Create pages with the role and relationship types that are updated in the database when the user creates a new business object.

| Field or Control | Description |
|------------------|-------------------------------------------------------|
| Market | Select the market for which this template is enabled. |

| Field or Control | Description |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Role Type | Select the role type for which you want to enable this quick create template. |
| Label | Enter the label that appears for this role type on the quick create page. |
| Criteria | Select the criteria definition that is invoked when searching for existing business objects from the Quick Create page. In the example page shot, when the user quick creates a <i>Company with Contact</i> , the <i>The Company</i> search definition is invoked to ensure that the company being created does not already exist. |
| Include Purchasing Options | Select to have the purchasing options appear on the Quick Create page. |
| Include Contact Info Entry | Select to include contact information for entry on the Quick Create page. |
| Apply Controlling BO | Select to have the system search for existing values of the role type only within logically related values for the parent business object. For example, if a company has multiple contacts, the system searches for contacts of the company only, regardless of whether other contacts with the search criteria exist. |

Field Selection

Select one or more field definitions to include on the quick create template.

Related Links

[Maintaining Contact Information for Business Objects](#)

[Understanding Purchasing Options](#)

Relationships Page

Use the Relationships page (RBQ_QCTMPL_REL) to define the relationships between the roles defined on the quick create template.

Navigation:

Set Up CRM > Common Definitions > Customer > BO Search > Quick Create Template > Relationships

This example illustrates the fields and controls on the Relationships page. You can find definitions for the fields and controls later on this page.

Template

Relationships

Role and Relationship Selection

Customize | Find | First 1 of 1 Last

| Role Type 1 | Role Type 2 | Relationship Type | |
|--------------------|--------------------|------------------------------|--------------|
| <div>Contact</div> | <div>Company</div> | <div>Contact / Company</div> | <div>-</div> |

Note: Defining template relationships is optional. Define relationships between roles only if you include more than one role on a template.

Role and Relationship Selection

This page region enables you to specify the relationships that are built between the roles that are defined on a quick create template.

| Field or Control | Description |
|-----------------------------|--------------------------------------------------------------|
| Role Type 1 and Role Type 2 | Select the role types that are defined on the template. |
| Relationship Type | Select the relationship type between the two selected roles. |

Quick Create Page

Use the Quick Create page (RBQ_QCDFN) to set up a quick create definition and associate one or more quick create templates to it.

Navigation:

Set Up CRM > Common Definitions > Customer > BO Search > Quick Create > Quick Create

This example illustrates the fields and controls on the Quick Create page. You can find definitions for the fields and controls later on this page.

Quick Create

Quick Create Definition

*Description

The Customer and Contact

Save As

Quick Create Template

Customize | Find | | First 1-4 of 4 Last

| Quick Create Template | Primary | | | |
|--------------------------------------|-------------------------------------|--|--------------|--------------|
| <div>The Company</div> | <input type="checkbox"/> | | <div>+</div> | <div>-</div> |
| <div>The Company with Contact</div> | <input checked="" type="checkbox"/> | | <div>+</div> | <div>-</div> |
| <div>The Consumer</div> | <input type="checkbox"/> | | <div>+</div> | <div>-</div> |
| <div>The Consumer with Contact</div> | <input type="checkbox"/> | | <div>+</div> | <div>-</div> |

Stamp System Data

| Field or Control | Description |
|-----------------------|----------------------------------------------------------------|
| Quick Create Template | Select one or more templates to associate with the definition. |

| Field or Control | Description |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Primary | <div>Select to indicate that the template is the primary, or controlling, template used by the quick create definitions.</div> <div>Primary templates appear first on the runtime Quick Create page.</div> |

Search Role Page

Use the Search Role page (RBQ_SRCHRL) to associate search fields with a role type.

Navigation:

Set Up CRM > Common Definitions > Customer > BO Search > Search Role > Search Role

This example illustrates the fields and controls on the Search Role page (1 of 2). You can find definitions for the fields and controls later on this page.

Search Role

General Options

Description

360 (GBL) Cont of Company

Label

Contact of Company

Role Type ID

Contact

Relationship Type

Contact / Company

Relationship Type 2

Primary Contact / Company

Apply SetID Security

☐ None

☐ Both BOs

☐ Primary BO

☒ Related BO

Apply Application Security

☐ Primary BO

☒ Related BO

Apply Controlling BO

☐ Primary BO

☒ Related BO

Apply Filter BO

☒ Primary BO

☐ Related BO

Filter Record

Quick Create Template

Maximum Rows

50

Save As

This example illustrates the fields and controls on the Search Role page (2 of 2). You can find definitions for the fields and controls later on this page.

Used in Search Definitions
[Customize](#) | [Find](#) | [View All](#) |

First 1-3 of 3 Last

| Search Definition | |
|--------------------------|--|
| 360 Person (GBL) | |
| 360 BO all details (GBL) | |
| 360 Contact (GBL) | |

Field Selection

Primary Additional

| Field | Related BO | Search | Result | Transfer to Field Definition |
|-------------|-------------------------------------|-------------------------------------|-------------------------------------|------------------------------|
| Last Name | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| First Name | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Name | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Phone | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Email | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Address | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| City | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| State | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Postal | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Country | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Customer ID | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |

A search role definition associates field definitions to one or more role types. When the user searches for a field, only business objects with a role that is associated with the search role definition are returned in the search results. Each search role definition is associated with a SQL engine and generates a single driver SQL statement and multiple list field SQL statements.

Search role definitions also specify how the search is conducted: security options, relationships to search, how the results are filtered, and the quick create template that is used to create new objects for the role.

General Options

Enter information that describes the role and how it appears.

| Field or Control | Description |
|------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Relationship Type and Relationship Type 2 | Select a relationship type. All relationship types that apply to the role appear in these drop down lists. The one that you select is used to filter the search results. |
| Apply SetID Security | <p>Select the options that determine how setID security is applied.</p> <p>If you do not specify a relationship for the role, this field is a check box that you either select or not.</p> <p>If you specify a relationship for the role, you have the options to apply SetID security to the primary, related, both, or neither business object in the relationship.</p> |
| Apply Application Security, Apply Controlling BO, and Apply Filter BO | Select the options that determine whether application security, controlling BO, and filter BO are applied to the primary or related business object in the relationship. If you do not specify a relationship, these options are not available. |
| Filter Record | Enter the name of a record that is used to filter the search results. |
| Quick Create Template | Enter the name of the quick create template that is used to enter a new object in the event of an unsuccessful search, or that is invoked directly from the BO Search by clicking the pencil icon. |

Used in Search Definitions

A list of all search definitions that use the role appears here.

Field Selection

Add fields that the role can search.

| Field or Control | Description |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Related BO | <p>Select if the field is a field of a related BO.</p> <p>For example, for the Contact search role, you can check the Company Name field as a related BO because the field belongs to the company record and not the contact record.</p> |
| Search | Select to use this field as a search criterion. |

| Field or Control | Description |
|-------------------------|--------------------------------------------------------|
| Result | Select for this field to appear in the search results. |

Additional Search Role Options

Access the Field Selection - Additional tab.

This example illustrates the fields and controls on the Field Selection - Additional page. You can find definitions for the fields and controls later on this page.

| *Field | Search By Role | Search By Rel | |
|-------------|-------------------------------------|-------------------------------------|---|
| Last Name | <input type="checkbox"/> | <input type="checkbox"/> | - |
| First Name | <input type="checkbox"/> | <input type="checkbox"/> | - |
| Name | <input type="checkbox"/> | <input type="checkbox"/> | - |
| Phone | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | - |
| Email | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | - |
| Address | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | - |
| City | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | - |
| State | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | - |
| Postal | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | - |
| Country | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | - |
| Customer ID | <input type="checkbox"/> | <input type="checkbox"/> | - |

Use this page to override search views defined on the Field Definition - Role page.

Search Page

Use the Search page (RBQ_SRCHDFN) to define a BO search with one or more search roles, search fields, and related BOs.

Navigation:

Set Up CRM > Common Definitions > Customer > BO Search > Search > Search

This example illustrates the fields and controls on the Search page (1 of 2). You can find definitions for the fields and controls later on this page.

Search

General Options

***Description** The Customer All Details

***Label** Customer

☒ **Enable Role Groups**

Search Definition Group

Label Person

***Control Type** Independent

***Result Display Type** Two column selection

☐ **Select Multiple**

Quick Create The Customer with Contact

Role Definition Selection

| *Role Definition | | | |
|-------------------------|--|--|-----|
| The Contact of Company | | | + - |
| The Contact of Consumer | | | + - |
| The Consumer | | | + - |

This example illustrates the fields and controls on the Search page (2 of 2). You can find definitions for the fields and controls later on this page.

Result Field Selection

| Field Definition | | Role Type | Related BO | |
|------------------|--|---------------------|-------------------------------------|---|
| Last Name | | | <input type="checkbox"/> | - |
| First Name | | | <input type="checkbox"/> | - |
| Name | | Company | <input checked="" type="checkbox"/> | - |
| Last Name | | Individual Consumer | <input checked="" type="checkbox"/> | - |
| First Name | | Individual Consumer | <input checked="" type="checkbox"/> | - |
| Phone | | | <input type="checkbox"/> | - |
| Email | | | <input type="checkbox"/> | - |
| Address | | | <input type="checkbox"/> | - |
| City | | | <input type="checkbox"/> | - |
| State | | | <input type="checkbox"/> | - |
| Postal | | | <input type="checkbox"/> | - |
| Country | | | <input type="checkbox"/> | - |

| Field or Control | Description |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Enable Role Groups | <p>Select to group the search results by role. For example, the Company, Site, and Alternate Capacity roles are grouped in the Organization group and the Consumer, Contact of Company, Contact of Consumer, Worker roles are grouped in the Individual group.</p> <hr/> <p>Note: The appearance of this page changes when you select this check box. Two additional page regions, Search Definition Group and Field Selection appear.</p> <hr/> |

Search Definition Group

| Field or Control | Description |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Control Type | <p>Indicate if the role group is <i>Controlling</i>, <i>Independent</i>, or <i>Dependent</i>.</p> <p>Results appear with the controlling role first, followed by all dependent group records that are associated with the controlling group. For example, this enables users to display organizations first, then all the individuals that are associated with the organization. You can only have one <i>Controlling</i> group.</p> |
| Result Display Type | Indicate whether the results appear in one column or two column format. |
| Select Multiple | Select to enable the user to choose multiple records from the result set. |
| Quick Create | Select the quick create definition to associate with the role. |

Role Definition

Select one or more roles for the search definition, define their appearance in results, and associate them with quick create definitions.

| Field or Control | Description |
|-------------------------|--------------------------------------------------------------------------|
| Role Definition | Select one or more search roles to associate with the search definition. |

Result Field Selection

This page region appears when you select **Enable Role Groups**. If you associate more than one role definition to a search, then you must enter field definitions. This is necessary because two or more roles can use the same field definition. You must indicate to which role the field pertains.

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Field Definition | Select the name of the field definition. |
| Role Type | Select the role type to associate with the field definition. When the system displays results of the BO search, if role groups are enabled, the field appears only in the role group for the role type with which it is associated. |
| Related BO | Select to indicate that the field is defined on a related BO, not the primary BO that is the target of the search definition. |

Criteria Page

Use the Criteria page (RBQ_CRITDFN) to specify the advanced search criteria fields and advanced search definition.

Navigation:

Set Up CRM > Common Definitions > Customer > BO Search > Criteria > Criteria

This example illustrates the fields and controls on the Criteria page (1 of 2). You can find definitions for the fields and controls later on this page.

Criteria

General Options

*Description

*Label

*Search Definition

Search Definition 1

☐ Enable Search Filter

☒ Show Search Operators

This example illustrates the fields and controls on the Criteria page (2 of 2). You can find definitions for the fields and controls later on this page.

| Field Selection | | | | | |
|-------------------------------------------------------------------|--------------|-------------------------------------|--------|-----|-----|
| Customize Find View All [Icon] [Icon] First 1-7 of 7 Last | | | | | |
| *Field Definition | Role Type ID | Enable Search 1 | | | |
| Name | Partner | <input type="checkbox"/> | [Icon] | [+] | [-] |
| First Name | | <input checked="" type="checkbox"/> | [Icon] | [+] | [-] |
| Last Name | | <input checked="" type="checkbox"/> | [Icon] | [+] | [-] |
| City | | <input type="checkbox"/> | [Icon] | [+] | [-] |
| State | | <input type="checkbox"/> | [Icon] | [+] | [-] |
| Postal | | <input type="checkbox"/> | [Icon] | [+] | [-] |
| Country | | <input type="checkbox"/> | [Icon] | [+] | [-] |

This object was delivered by PeopleSoft but updated by the customer.

| Audit History | | |
|-----------------|-----------------------|---------|
| Modified | 05/11/2004 5:44PM PDT | PPLSOFT |

This page captures information about the search definitions to invoke when the user enters certain fields.

| Field or Control | Description |
|-------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Description | <p>Enter the name for the group of criteria that you specify.</p> <p>This name is used to link the criteria to an adapter section.</p> |
| Search Definition | <p>Enter the default search definition.</p> <p>The definition is used by default when the user searches for a field</p> |
| Search Definition 1, Search Definition 2, Search Definition 3, Search Definition 4, and Search Definition 5 | <p>Enter alternate search definitions.</p> <p>These search definitions appear at runtime. The user can search by the default definition or select an alternate.</p> |
| Enable Search Filter | <p>Select to have only the search fields that are associated with the selected search definition appear at runtime.</p> |
| Show Search Operators | <p>Select to have the search operators appear on the BO Search page at runtime.</p> |

Field Selection

Use this page region to select fields for a search criteria definition, specify the roles for which the field appears, and select the search definitions for which the field is enabled.

| Field or Control | Description |
|------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Role Type ID | Select the role to which the field applies, in the case where a field is shared by different roles. For example, if the Name field is shared between the Company and Site roles. To have it appear once as <i>Company Name</i> and once as <i>Site Name</i> , you need to select the Name field twice and associate one to the Company role and one to the Site role. |
| Enable Search 1, Enable Search 2, Enable Search 3, Enable Search 4, and Enable Search 5 | Select to enable the corresponding search definition for the field. For example, if you enable Search 1 and Search 3 for a field, then these search definitions appear in a drop down list at runtime. The user can select a search definition or search by the default definition. |

Note: If you select a field for multiple roles, at runtime the field appears once in the search criteria for each role selected. You can specify different field labels for each role to differentiate between multiple occurrences.

Adapter Page

Use the Adapter page (RBQ_ADPTR) to specify the basic search criteria fields.

Navigation:

Set Up CRM > Common Definitions > Customer > BO Search > Adapter > Adapter

This example illustrates the fields and controls on the Adapter page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Adapter' page with tabs for 'Adapter', 'Sections', and 'Labels'. The 'General Options' section contains the following fields and controls:

- *Description**: Text field with value 'CDM Person'.
- *Component Name**: Text field with value 'RD_PERSON' and a search icon.
- *Market**: Dropdown menu with value 'GBL'.
- Mapping Reference**: Text field.
- Create Option**: Dropdown menu.
- Application Class ID**: Dropdown menu with value 'CDMPerson'.
- Toolbar ID**: Dropdown menu.
- ☐ **Config Search applicable**
- ☐ **Trace SQL Statement**

The 'Extension Selection' section has a toolbar with 'Customize', 'Find', and navigation icons. It displays a table with the following data:

| *Extension Event | Section Record Name | | |
|------------------|---------------------|---|---|
| PostComplete | Customer | + | - |
| PostComplete | Customer FSI | + | - |
| PostComplete | Company | + | - |
| PostComplete | Partner_1 | + | - |

| Field or Control | Description |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Component Name | Specify the component to which this adapter definition pertains. |
| Market | Select the market to which this adapter definition pertains. |
| Mapping Reference | Enter a reference that is used to switch adapters if more than one adapter is needed for a component. This might occur if the same field is used by more than one role. |
| Create Option | The Create Option is used to hold an authorization code that determines which users can use quick create. |
| Application Class ID | Select the application class where subpages defined by the adapter are defined. |

| Field or Control | Description |
|------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Toolbar ID | Select the name of the component toolbar where the names of the business objects that are retrieved by BO Search appear. A component toolbar is used to display common information across all pages in the component. |
| Config Search Applicable (configurable search applicable) | Select to enable configurable search pages for the component to invoke this search definition. |
| Trace SQL Statement | Select to have the system write the SQL statements that are executed by the search at runtime to a trace log. |

Extension Selection

| Field or Control | Description |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Extension Event | Select a method from the list that appears. This list contains the methods of the selected application class. You can use these to write custom code. |
| Section Record Name | Enter the section to which this extension applies. The list of available sections is taken from the sections that you defined on the Sections page. |

Sections Page

Use the Sections page (RBQ_ADPTR_SECT) to define the records and fields that appear on transaction subpages.

Navigation:

Set Up CRM > Common Definitions > Customer > BO Search > Adapter > Sections

This example illustrates the fields and controls on the Sections page (1 of 2). You can find definitions for the fields and controls later on this page.

AdapterSectionsLabels

Section Selection

Find | View All | First 1 of 7 Last

*Description

Ship To Customer

*Criteria

CDM Ship To Customer

Page Name

Adapter Section Test

Section Record

RBQ_ADPTR_TMPV1

*Section Type

Two column

☐ Enable Search Button

Field Selection

Find | View All | First 1 of 2 Last

*Field

Name

Criteria

Mapping Reference

SHIP_TO_CUSTOMER

☒ BO Assigned

☒ Section Control

Display Options

*Display Sequence

1

Display Option

*Initialized Display

None

Initialized Label

☐ Search By Role

☒ Visible Option

*Identified Display

Hyperlink

Identified Label

This example illustrates the fields and controls on the Sections page (2 of 2). You can find definitions for the fields and controls later on this page.

Security Options

Primary Object

Search Option

ACCACQMGR

Related Object

Related Section

Role Definition Selection

Customize | Find | First 1-2 of 2 Last

| Role Type | Relationship Type | Apply Security | | |
|----------------------|-------------------|--------------------------|---|---|
| Ship To Organization | | <input type="checkbox"/> | + | - |
| Ship To Individual | | <input type="checkbox"/> | + | - |

Note: Before you configure the transaction adapter for fields, make sure that you have an extensive understanding of system data and transactions.

| Field or Control | Description |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Section Record | The name of the record that is used as the subpage on the transaction. |
| Criteria | Select the criteria definition that is used by this section. |
| Section Type | Select from <i>One Column</i> , <i>Two Column</i> , <i>Hidden</i> , or <i>Custom</i> . If you need to identify a customer in a grid, then specify <i>Custom</i> . <i>Custom</i> sections are used in configurable search pages; other section types are used for customer identification on component and transaction pages. |

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Page Name | Select the page name that can contain this adapter section. This provides the flexibility to define sections with differing section options, for example, security, in the same adapter. |
| Enable Search Button | Select to have a Search button appear on the sub page at runtime. |

Field Selection

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Field | Enter the name of the field to appear on the transaction. |
| BO Assigned | Select to indicate that this field is associated to a primary BO on this section. |
| Section Control | Select to have the field label as defined for this section take precedence over label definitions for the same field as defined for any other section or role. This ensures consistency of the user interface. |
| Criteria | <p>Select to use a value that is identified for the field as a criteria for additional searches.</p> <p>For example, when a company is identified at runtime, a prompt button with a search for contact appears. When the user clicks the prompt, the system invokes the search definition that is entered in this field.</p> |
| Mapping Reference | Enter the logical name of the field on the transaction's component buffer. |

Display Options

The entries in this page region control how the section appears to the user at runtime. Different fields appear depending on the **Section Type** you select.

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|------------------------------------------------------|
| Search by Role | Select to have the search results displayed by role. |

| Field or Control | Description |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Required Flag | Select to require that the user enter search criteria in the section's fields. This field appears only if you select a Section Type of <i>Custom</i> . |

The following fields appear only if the **Section Type** is not *Custom*.

| Field or Control | Description |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Display Option | Select the functional option that controls security on this field. This is used in conjunction with display templates. |
| Initialized Display | Select how the field appears when the user first accesses the component. The options in this list control if the field is enterable and if the user can look up field values. For example, the Company Name field on the Case component is enterable but not required. |
| Identified Display | Select how the field appears when a value is found for the field. For example, if the company name is found, the name appears as a link to the Company component. |
| Initialized Label | Enter the text for the field label when the user first accesses the component. For example, <i>Enter a Company Name</i> . |
| Identified Label | Enter the text of the field label that appears when the user first accesses the component. For example, <i>Company Name</i> . |

Security Options

This section is not used.

Role Definition Selection

Select the role and relationship to be secured for the section and check the **Apply Security** check box. If no security is required then leave the check box empty. If Customer fields require restricted views, then the check box must be selected on both sections.

This page region works in conjunction with the **Security Options** region, in this way:

The primary and related search objects define the relationship between the two adapter sections and the search options define the authorization code that determines which users are restricted. The **Apply Security** check box determines to which roles and relationships of the two objects security is applied.

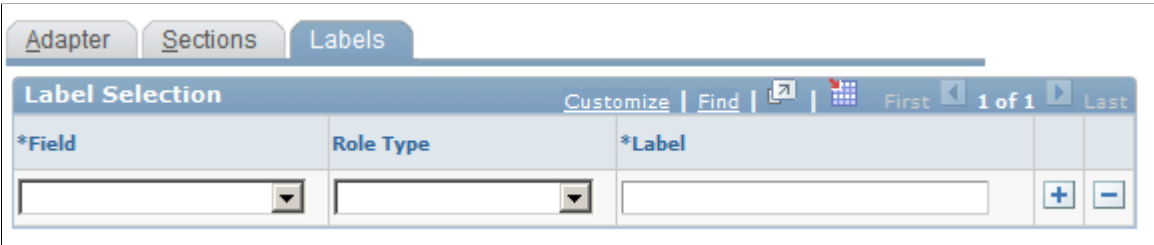
Defining Labels

Use the Labels page (RBQ_ADPTR_LBL) to define labels.

Navigation:

Set Up CRM > Common Definitions > Customer > BO Search > Adapter > Labels

This example illustrates the fields and controls on the Labels page. You can find definitions for the fields and controls later on this page.



Use this page to specify the labels that appear on BO search and quick create pages that are initiated from a transaction subpage. This ensures consistency between labels for fields on customer identification subpages, advanced BO Search pages, and Quick Create pages.

| Field or Control | Description |
|------------------|-------------------------------------------------------------------------------------------------------------|
| Role Type | Select the role type to which this label applies. If not selected, the label override applies to all roles. |

Defining Ad Hoc Business Objects

Understanding Ad Hoc Business Objects

The business object types that the PeopleSoft system delivers are sufficient to process all transactions in the delivered PeopleSoft Customer Relationship Management (PeopleSoft CRM) system. To meet additional business requirements, you can define ad hoc business objects. You define and manage ad hoc business objects in the Business Object component.

Before you can add an ad hoc business object to the system, you must define control values for the object. Ad hoc business objects use the same controls as delivered business objects: business object types, name types, role types, and relationship types.

Note: You use the same pages to define and maintain control information for ad hoc business object that you use to maintain controls for business object types, such as company, site, and person, that are delivered with PeopleSoft CRM.

You can also use the relationship viewer in the Business Object component to maintain names, roles, and relationships for the business objects that you maintain in CRM components (Company, Site, and Person). For example, to add the broker role to a contact, you would search for the contact by name and access the Relationship Viewer page. To create these roles and relationships, you must first set up the appropriate control values and configure a relationship view to recognize this type of relationship.

Related Links

[Understanding Business Object Controls](#)

[Business Object Relationship Modelling](#)

Defining Ad Hoc Business Objects

To define ad hoc business objects, use the Business Object (BO) component.

These topics discuss how to:

- Maintain name information.
- View and maintain ad hoc business object relationships.

Pages Used to Define Ad Hoc Business Objects

| Page Name | Definition Name | Usage |
|--------------------------------------------------------|------------------------|---------------------------------------------------------|
| Business Object - Business Object Page | BO | Maintain name information for ad hoc business objects. |
| Business Object - Relationships Page | BO_REL | View and maintain ad hoc business object relationships. |

Related Links

[Understanding the Relationship Viewer](#)

Business Object - Business Object Page

Use the Business Object - Business Object page (BO) to maintain name information for ad hoc business objects.

Navigation:

Customers CRM > Business Object > Business Object

This example illustrates the fields and controls on the Business Object - Business Object page. You can find definitions for the fields and controls later on this page.

Business Object Relationships

Business Object ID 249

Business Object Type Individual

Business Object Name Marx,Stu Manager

Name Information Customize | Find | View All | First 1 of 1 Last

| Primary | Name Type | Business Object Name |
|-------------------------------------|----------------|----------------------|
| <input checked="" type="checkbox"/> | Preferred Name | Marx,Stu Manager |

Add Name Edit Name

| Field or Control | Description |
|-------------------------|------------------------------------|
| Name Type | Displays the business object type. |

See [Defining Business Object and Name Types](#).

Business Object - Relationships Page

Use the Business Object - Relationships page (BO_REL) to view and maintain ad hoc business object relationships.

Navigation:

Customers CRM > Business Object > Relationships

See [Understanding the Relationship Viewer](#).

Managing Enterprise Integration for PeopleSoft CRM

Understanding Enterprise Integration Technology

These topics discuss:

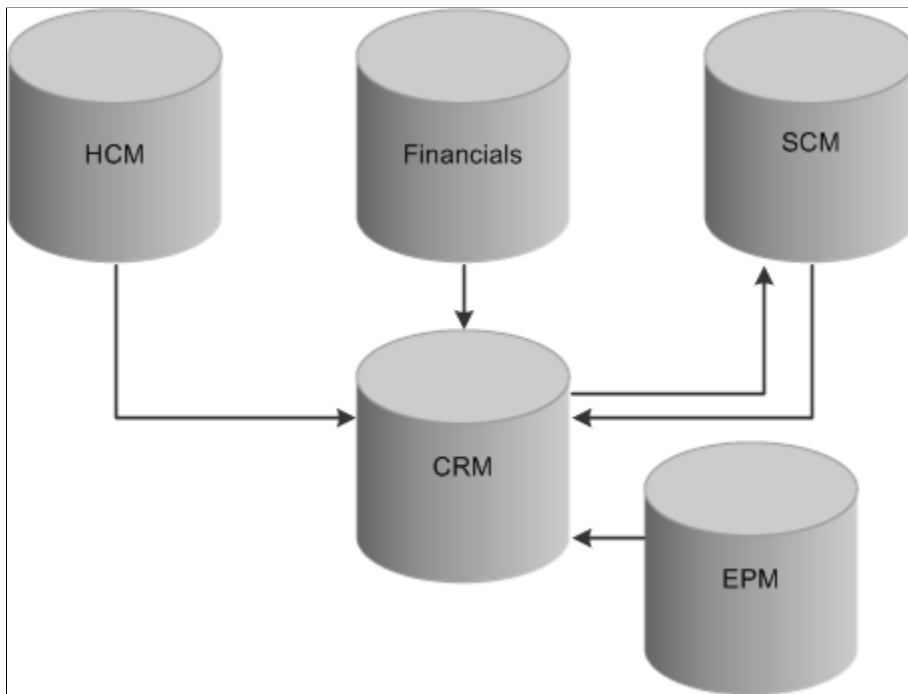
- EIPs in PeopleSoft CRM.
- PeopleSoft CRM foundation EIPs.
- Application messages.
- Data mapping for application messages.

EIPs in PeopleSoft CRM

PeopleSoft CRM applications collaborate to manage and share data across your enterprise—from managing customers and workers to tracking inventory. They use EIPs primarily to integrate with:

- PeopleSoft applications outside of CRM.
- Third-party applications.

This diagram illustrates how PeopleSoft CRM works with other PeopleSoft applications to manage and share data across your enterprise:



PeopleSoft CRM integrates with:

- PeopleSoft HCM, which publishes employee and workforce data to the CRM database.
- PeopleSoft Financial Management Solutions and PeopleSoft Supply Chain Management (PeopleSoft SCM) for customer, contact, and product information.

This is a two-way integration.

- PeopleSoft Enterprise Performance Management (PeopleSoft EPM), which publishes the data mining results from Customer Behavior Modeling for use in PeopleSoft CRM.

By taking advantage of the integration technology that PeopleSoft software provides and the existing integrations with PeopleSoft HCM, PeopleSoft Financial Management Solutions, and PeopleSoft SCM, you can integrate with other third-party systems. PeopleSoft CRM achieves integration using Application Messaging, Business Interlinks, and the PeopleTools Integration Broker technology.

PeopleSoft CRM offers many ways of integrating with third-party applications. For example, if you send or publish a message to a third-party system, the system structures the data into a message and automatically delivers it to the destination location. You can also accept or subscribe to messages from third-party systems. The system validates incoming data, checking for errors before updating the system of record.

You can also send a synchronous request or reply transaction to a third-party system for processing and receive a real-time response.

Note: There is no CRM LOCATION_SYNC_EFF, LOCATION_FULLSYNC_EFF, DEPT_SYNC_EFF and DEPT_FULLSYNC_EFF message in CRM. The LOCATION_SYNC, LOCATION_FULLSYNC, DEPT_SYNC, and DEPT_FULLSYNC messages contain both the SYNC and EFF message structures.

See the product documentation for *PeopleTools: PeopleSoft Integration Broker* and *PeopleTools: PeopleSoft Integration Broker Testing Utilities & Tools*.

PeopleSoft CRM Foundation EIPs

This table lists the EIPs that are provided with PeopleSoft software for foundation PeopleSoft CRM:

| EIP Name | Description | Message Name | Direction of Integration | Technology |
|-------------------|----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|--------------------------------------|---------------------|
| CUSTOMER | Customer information is retrieved to PeopleSoft CRM from other external systems. | CUSTOMER_SYNC CUSTOMER_FULLSYNC_EFF | PeopleSoft CRM ↔ SCM/external system | Application Message |
| CUSTOMER_COMPANY | Synchronizes company information with other systems. | CUST_COMPANY_FULLSYNC CUST_COMPANY_FULLSYNC_EFF CUST_COMPANY_SYNC CUST_COMPANY_SYNC_EFF | PeopleSoft CRM ↔ SCM/external system | Application Message |
| CUSTOMER_CONSUMER | Synchronizes consumer information with other systems. | CUST_CONSUMER_FULLSYNC CUST_CONSUMER_FULLSYNC_EFF CUST_CONSUMER_SYNC CUST_CONSUMER_SYNC_EFF | PeopleSoft CRM ↔ SCM/external system | Application Message |
| CUSTOMER_SITE | Synchronizes site information with other systems. | CUST_SITE_FULLSYNC CUST_SITE_FULLSYNC_EFF CUST_SITE_SYNC CUST_SITE_SYNC_EFF | PeopleSoft CRM ↔ SCM/external system | Application Message |

| <i>EIP Name</i> | <i>Description</i> | <i>Message Name</i> | <i>Direction of Integration</i> | <i>Technology</i> |
|---------------------------|---------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|-------------------------------------------------|--------------------------|
| WORKER | Synchronizes worker information with other systems. | WORKER_ FULLSYNC WORKER_ FULLSYNC_EFF WORKER_SYNC WORKER_SYNC_ EFF | PeopleSoft CRM – >external system | Application Message |
| CUSTOMER_ CONTACT | Synchronizes contact information with other systems. | CONTACT_SYNC CONTACT_SYNC_ EFF CONTACT_ FULLSYNC CONTACT_ FULLSYNC_EFF | PeopleSoft CRM ↔ SCM/external system | Application Message |
| BUSINESS UNIT TABLE FS | Synchronizes financial business unit data. | BUS_UNIT_FS_ FULLSYNC BUS_UNIT_FS_SYNC | PeopleSoft CRM ↔ SCM | Application Message |
| TABLE SET CONTROL | Synchronizes setID data. | SETID_INITIALIZE | PeopleSoft CRM ↔ SCM | Application Message |
| COUNTRY TABLE | Synchronizes country codes and address data to an external system. | COUNTRY_ FULLSYNC COUNTRY_SYNC | PeopleSoft CRM ↔ SCM/HCM/External system | Application Message |
| STATE TABLE | Synchronizes state name, description, and abbreviation information with an external system. | STATE_FULLSYNC STATE_SYNC | PeopleSoft CRM ↔ SCM/HCM/external system | Application Message |
| UNIT OF MEASURE | Synchronizes units of measure. | UOM_FULLSYNC UOM_SYNC | PeopleSoft SCM/HCM/ external system → CRM | Application Message |
| CURRENCY CODE TABLE | Transmits currency code data. | CURRENCY_ FULLSYNC CURRENCY_SYNC | PeopleSoft CRM ↔ SCM/external system | Application Message |

| <i>EIP Name</i> | <i>Description</i> | <i>Message Name</i> | <i>Direction of Integration</i> | <i>Technology</i> |
|------------------------|---------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|--------------------------|
| MARKET RATES DATA | Imports and synchronizes updated market rates. | CURR_QUOTE_MTHD_FULLSYNC CURR_QUOTE_MTHD_SYNC MARKET_RATE_DEFN_FULLSYNC MARKET_RATE_DEFN_SYNC MARKET_RATE_FULLSYNC MARKET_RATE_SYNC MARKET_RATE_LOAD MARKET_RATE_INDEX_FULLSYNC MARKET_RATE_INDEX_SYNC MARKET_RATE_TYPE_FULLSYNC MARKET_RATE_TYPE_SYNC | PeopleSoft CRM ↔ SCM/HCM/external system | Application Message |
| DEPARTMENT TABLE | Synchronizes departments across the enterprise. | DEPT_FULLSYNC DEPT_SYNC | PeopleSoft CRM ↔ SCM/HCM/external system | Application Message |
| LOCATION TABLE | Synchronizes location table data across the enterprise. | LOCATION_FULLSYNC LOCATION_SYNC | PeopleSoft CRM ↔ SCM/HCM/external system | Application Message |
| PRODUCT | Synchronizes product information with PeopleSoft SCM or third-party external systems. | PRODUCT_FULLSYNC PRODUCT_SYNC PRODUCT_GROUP_FULLSYNC PRODUCT_GROUP_SYNC PRODUCT_SYNC_EFF | PeopleSoft CRM ↔ SCM/external system | Integration Broker |

| <i>EIP Name</i> | <i>Description</i> | <i>Message Name</i> | <i>Direction of Integration</i> | <i>Technology</i> |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|----------------------------------------|--------------------------|
| COMPETENCY TYPE | Receives competency information from PeopleSoft HCM. | CM_TYPE_ FULLSYNC CM_TYPE_SYNC | PeopleSoft CRM ← HCM | Application Message |
| COMPETENCY TABLE | Receives competency and accomplishment details from PeopleSoft HCM. | COMPETENCY_ FULLSYNC1 COMPETENCY_ SYNC1 | PeopleSoft CRM ← HCM | Application Message |
| PERSON COMPETENCY | Receives a person's competency data from PeopleSoft HCM. | PERSON_ COMPETENCY_ FULLSYNC PERSON_ COMPETENCY_ SYNC | PeopleSoft CRM ← HCM | Application Message |
| RATING MODEL | Receives rating model data from PeopleSoft HCM. | RATING_MODEL_ FULLSYNC RATING_MODEL_ SYNC | PeopleSoft CRM ← HCM | Application Message |
| PERSONAL DATA | Synchronizes personal data from PeopleSoft HCM. | PERSON_BASIC_ FULLSYNC PERSON_BASIC_ SYNC | PeopleSoft CRM ← HCM | Application Message |
| WORKFORCE DATA | Synchronizes workforce data from PeopleSoft HCM. | WORKFORCE_ FULLSYNC WORKFORCE_SYNC | PeopleSoft CRM ← HCM | Application Message |
| PERSON OF INTEREST DATA | Synchronizes persons of interest (POIs) that do not have a job record from PeopleSoft HCM. POIs with a job record are synchronized in the WORKFORCE DATA EIP. | PERS_POI SYNC | PeopleSoft CRM ← HCM | Application Message |
| CALENDAR/TASK | Fully synchronizes the calendar with Outlook, Lotus Notes, or other personal information manager (PIM). | PIM_CONTACT_ SYNC | PeopleSoft CRM ↔ Outlook/PIM | Application Message |

| <i>EIP Name</i> | <i>Description</i> | <i>Message Name</i> | <i>Direction of Integration</i> | <i>Technology</i> |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| CUSTOMER GROUP | Synchronizes customer groups. | CUSTOMER_GROUP_FULLSYNC CUSTOMER_GROUP_SYNC | PeopleSoft CRM ↔ SCM | Application Message |
| REPRESENTATIVE | Synchronizes representative data with PIM. | PIM_CONTACT_SYNC REP_SYNC | PeopleSoft CRM ↔ Personal Information Manager (PIM) | Application Message |
| PS GETID | Retrieves customer IDs and contact IDs from other PeopleSoft systems. | PSGETID | PeopleSoft CRM ↔ SCM | XML link |
| GET CUSTOMER VALUE | Retrieves customer value/KPI information from PeopleSoft EPM and updates the BC (Business Contact) and the RB_CLAF_EPM_KIP (Key Performance Indicator) tables in the PeopleSoft CRM database. | KP_KPI_ASMT_FACTS | PeopleSoft CRM ↔ EPM | Application Message |
| GET BILLS FOR 360 DEGREE VIEW | <ul style="list-style-type: none"> Requests billing information (bills) from PeopleSoft Billing to display in the 360-Degree View. PeopleSoft Billing responds with the billing information that is requested from the PeopleSoft CRM 360-Degree View. | <ul style="list-style-type: none"> BI_EIP360_REQ BI_EIP360_RSP | <ul style="list-style-type: none"> PeopleSoft CRM ↔ SCM PeopleSoft CRM ↔ SCM | <ul style="list-style-type: none"> Application Message Application Message |

| <i>EIP Name</i> | <i>Description</i> | <i>Message Name</i> | <i>Direction of Integration</i> | <i>Technology</i> |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| GET ACCOUNT RECEIVABLES FOR 360 DEGREE VIEW | <ul style="list-style-type: none"> Requests payment information (payments) from PeopleSoft Receivables to display in the 360-Degree View. PeopleSoft Receivables responds with the payment information that is requested from the PeopleSoft CRM 360-Degree View. | <ul style="list-style-type: none"> AR_CRM_REQUEST AR_CRM_RESPONSE | <ul style="list-style-type: none"> PeopleSoft CRM ↔ Financial Management Solutions PeopleSoft CRM ↔ Financial Management Solutions | <ul style="list-style-type: none"> Application Message Application Message |
| QUICK CODE | Synchronizes quick codes from CRM to HCM for use in building AAF policies. | <ul style="list-style-type: none"> HD_QUICK_CODE_FULLSYNC HD_QUICK_CODE_SYNC | PeopleSoft Enterprise CRM -> HCM system | Application Message |
| CREATE CASE | Synchronizes case-related information from HCM to CRM to create HR HelpDesk cases | HD_HRHD_CASE | PeopleSoft Enterprise HCM -> CRM system | Application Message |

EIPs that support particular business processes and applications are addressed in other PeopleSoft CRM documentation. The online EIP Catalog database lists, with technical details, the EIPs that PeopleSoft CRM uses.

Related Links

“Understanding Fulfillment Integration” (PeopleSoft Order Capture Applications)

“Integrating with PeopleSoft Financial Management Services” (PeopleSoft Integrated FieldService)

“Integrating with PeopleSoft Human Capital Management” (PeopleSoft Integrated FieldService)

“Integrating with PeopleSoft SCM” (PeopleSoft Integrated FieldService)

Application Messages

EIPs that publish data to another database are available as both FULLSYNC and SYNC messages. FULLSYNC messages are designed for use at implementation time for setup information. Once a table has been set up, the SYNC messages allow for updates to that data.

Important! Some FULLSYNC messages are designed to fully replace the data through the use of the header message. To avoid losing existing data, turn off the header—the message refreshes the data by updating the existing data and adding any missing data.

Application Message Setup

As delivered, PeopleSoft EIP application messages are inactive.

To set up a delivered application message:

1. Activate the application message.
2. For inbound messages, activate the message subscription PeopleCode.
3. Set the associated message channel to Run mode.
4. Configure an existing message node or define a new message node.
5. Define asynchronous or synchronous transactions on the message node.
6. Define relationships to reconcile transaction parameters for routing, transmission type, message structure, or message content, if necessary.

See *PeopleTools: PeopleSoft Integration Broker*.

Data Mapping for Application Messages

PeopleSoft CRM has the capability of subscribing to other PeopleSoft-application or third-party-application messages. Before PeopleSoft CRM can subscribe to a PeopleSoft EPM message or any third-party message, data mapping must occur between the source format and the destination format. To accommodate this data mapping, PeopleSoft CRM created a Data Mapping component. Using this component, you can perform data mapping for any single-level hierarchical message.

The integration between PeopleSoft EPM and CRM is currently the one place that uses this data mapping component. Before PeopleSoft CRM can receive key performance indicator (KPI) information through the KP_KPI_ASMT_FACTS application message from EPM, the application message data must be mapped to data fields that the CRM system recognizes. To assist with this integration, PeopleSoft provides a predefined data mapping structure sample.

Alternatively, data is inserted into RB_CLAF_EPM_KPI table via the KP_KPI_EPM terms subscription. This subscription creates terms for the Active Analytics Framework.

This table shows the predefined data mapping structure sample provided with PeopleSoft software to assist with integration between PeopleSoft CRM and EPM:

| Message Name | Record to Update | Fields to Update Field/XML Tag | Record Identification Field/XML Tag | Message Row Identification XML Tag Name/XML Tag Value |
|---------------------|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|------------------------------------------------------------------------|
| KP_KPI_ASMT_FACTS | BC | <ul style="list-style-type: none"> ASSESS_DESCR/ASSESS_DESCR ASSESS_ID/ASSESS_ID ASSESS_IMAGE_ID/ASSESS_IMAGE_ID KPI_ID/KPI_ID PCT_OF_TARGET/PCT_OF_TARGET RESOLVED_VALUE/RESOLVED_VALUE | CUST_ID/OBJ_ID | PF_OBJECT_TYPE/CUSTOMER MASTER |

Related Links

[Defining Company Information](#)

[Defining Person Information](#)

[Mapping Message Data to PeopleSoft CRM Records and Fields](#)

Integration with PeopleSoft HCM, PeopleSoft Campus Solutions or Third-Party HR Data

These topics discuss:

- Person Basic Fullsync and Person Basic Sync.
- Workforce Fullsync and Workforce Sync.
- Campus Solutions EIPs.
- Pers POI Sync.
- Customer Data Model EIP.
- Implementation using Fullsyncs.

PeopleSoft CRM employs a number of EIPs to integrate the CRM Customer Data Model (CDM) with PeopleSoft HCM, PeopleSoft Campus Solutions, or another third-party system. The interdependent nature of these EIPs makes it very important that they are used correctly and in the proper sequence to ensure data quality.

Person Basic Fullsync and Person Basic Sync

The Person Basic EIPs form the foundation of the CDM integrations. They are responsible for creating the Person object that is the building block of the CDM. Additional duties include the populating and updating of personal biographical data, National ID, and names. Finally, all creation and maintenance of contact methods (address, email, phone) are processed through the Person Basic EIPs.

Person Basic Fullsync versus Person Basic Sync

Person Basic Fullsync is designed as an initial load program to be used during system implementation to create new persons in the CDM. While it is possible to run Person Basic Fullsync more than once, it will not perform updates on existing person data or contact methods. Any existing person found in the fullsync message is skipped and written to a log file for review.

Once Person Basic Fullsync has been used for initial customer population creation, it should be deactivated and the incremental Person Basic Sync message activated. Person Basic Sync handles the creation of persons going forward as well as any subsequent updates to personal biographical data, National ID, names, and contact methods.

Search Match

Search Match is a utility that validates whether a new person being added to the CDM via an import or EIP actually already exists in CRM in order to avoid data duplication. The matching is based on a set of predefined criteria set in the Search Match configuration. Person Basic Sync is compatible with Search Match and, if enabled, will perform the matching function. Person Basic Fullsync, however, is not compatible with Search Match.

See “Using Search/Match with PERSON_BASIC_SYNC” (PeopleSoft CRM for Higher Education).

Contact Methods and Person Start Date

When the Person Basic EIPs create a new Person object, the new person is given the default *Individual* role type. It is important for data integrity that any contact methods created for the person do not have a start date that is earlier than the start date of the individual role. The possibility of this issue often arises in instances of a legacy data conversion where an extensive history of person data is being loaded into CRM for the first time. To handle this scenario, a comparison algorithm is performed using the inbound data so that the start date of the person object is set to the earliest of these three dates: the effective date of the PERSON_DATA_EFFDT record, the original hire date, and the earliest contact method effective date.

Example:

| <i>Person_Data_Effdt.Effdt</i> | <i>Person_Data_Effdt.Orig_Hire_Dt</i> | <i>Earliest Contact Method Effdt</i> | <i>Person Object, Individual Role Start Date</i> |
|---------------------------------------|----------------------------------------------|---------------------------------------------|---------------------------------------------------------|
| 6/20/2010 | 5/01/2010 | 5/02/2010 | 05/01/2010 |
| 6/20/2010 | Null | 04/01/2010 | 04/01/2010 |
| 6/20/2010 | 6/15/2010 | 07/01/2010 | 06/15/2010 |

Note: The audit *Date Stamp* on the CDM entry will reflect the day and time that the Person Basic message is processed by CRM and the record is added to the database. The *Date Stamp* may not match the *Person Role Start Date* if the *Person Role Start Date* is adjusted as in the above examples. This may also occur if there is an extended processing delay between the time the message is published from HCM and ultimately received and processed by CRM.

Adding Contact Methods Across Roles

Person Basic EIPs provide only the *Individual* role when a person is created. Additional roles such as *Worker* or *Consumer* are added to persons later by the other CDM EIPs that rely on the Person object having already been created. Despite this, Person Basic Sync is responsible for the subsequent contact method maintenance across all roles held by the person.

When Person Basic Sync receives a request to add a new contact method of a particular contact method type (address, email, phone) for an existing person, it uses the configuration on the Contact Method Type definition to determine which roles the contact method will be added to if they exist for the person. Available roles are *Individual Consumer*, *Worker*, and *POI* (person of interest).

This example illustrates the Contact Method Type page.

| Relationships | | | | | |
|---------------------------------|-------------------------------|----------------------|-------|------------|------|
| | | Customize View All | First | 1-10 of 12 | Last |
| *Priority | Relationship Type ID | | | | |
| <input type="text" value="3"/> | Primary Contact / Company | | | | |
| <input type="text" value="6"/> | Contact / Company | | | | |
| <input type="text" value="5"/> | Primary Contact / Site | | | | |
| <input type="text" value="7"/> | Contact / Site | | | | |
| <input type="text" value="4"/> | Primary Contact / Consumer | | | | |
| <input type="text" value="8"/> | Contact / Consumer | | | | |
| <input type="text" value="1"/> | Primary Contact / Partner | | | | |
| <input type="text" value="11"/> | Contact / Partner | | | | |
| <input type="text" value="10"/> | Contact / Partnership | | | | |
| <input type="text" value="4"/> | Primary Contact / Partnership | | | | |

| Person Basic Sync Setting | |
|---------------------------|-------------------------------------|
| Role Type ID | Add Contact Methods |
| Worker | <input type="checkbox"/> |
| Individual Consumer | <input checked="" type="checkbox"/> |
| Person of Interest | <input type="checkbox"/> |

This object was delivered by PeopleSoft but updated by the customer.

Modified 12/06/2010 2:35PM PST VP1

When a new contact method is created, it cannot have a start date that predates the established role to which it is to be associated. The start date of the contact method will be adjusted accordingly upon creation if necessary. This table lists several examples:

| <i>Person Basic Sync Run Date</i> | <i>Inbound Contact Method Start Date</i> | <i>Role Exists?</i> | <i>Role Start Date</i> | <i>Resulting Contact Method Start Date</i> |
|-----------------------------------|------------------------------------------|---------------------|------------------------|--------------------------------------------|
| 5/30/2010 | 5/01/2010 | Yes | 1/1/2010 | 5/01/2010 |

| Person Basic Sync Run Date | Inbound Contact Method Start Date | Role Exists? | Role Start Date | Resulting Contact Method Start Date |
|---------------------------------------|----------------------------------------------|---------------------|------------------------|------------------------------------------------|
| 5/30/2010 | 5/01/2010 | Yes | 5/15/2010 | 5/15/2010 |
| 5/30/2010 | 5/01/2010 | No | 5/30/2010 | 5/30/2010 |
| 5/30/2010 | 7/01/2010 | Yes | 1/1/2010 | 7/01/2010 |

Note: Contact methods that are entered manually into CRM are not maintained by Person Basic Sync.

See [Contact Method Type Page](#).

Person Basic Message Logging

During Person Basic EIP processing, some informational messages will be written to the message log. It happens, for example, when existing persons are skipped by Person Basic Fullsync or when there are issues with the Search Match configuration issues that need to be addressed. Additionally, the log can be used to debug integration issues should a Person Basic message go to error status. Users can access the log file after a run is completed through the Service Operations Monitor under this navigation: **PeopleTools > Integration Broker > Service Operations Monitor > Monitoring > Asynchronous Services**.

Select the completed PBS or PBS_FS message details.

Select the Error Messages link and the log will be displayed.

Workforce Fullsync and Workforce Sync

The Workforce EIPs are another important part of the CDM EIP structure. They are responsible for importing job and employment data for persons from PeopleSoft HCM or PeopleSoft Campus Solutions into CRM. Workforce is dependent on the Person Basic EIPs having already created the Person object for which the job and employment data is being synchronized. Workforce Fullsync is for initial load of job data and the incremental Workforce Sync handles updates and additions going forward.

Besides importing POI data, Workforce EIPs affect the CDM in two ways. First, they create the *Worker* role for the Person object if it does not already exist. Second, when the *Worker* role is added, any existing contact methods for that person are cloned and added to the *Worker* role. This is the only contact method interaction for Workforce EIPs; all subsequent changes or additions are processed through Person Basic Sync.

For import of employee job data from non-PeopleSoft third-party systems, the Worker Sync EIP is used.

Job Code Data

PeopleSoft CRM subscribes to all job information for worker and for POI. All fields (except for Physical Location) in the Worker component are updated from PeopleSoft HCM.

Related Links

[Worker Data Integration with Third-Party Systems](#)

Campus Solutions EIPs

PeopleSoft Campus Solutions maintains multiple EIP integrations with CRM to add and maintain student and prospective student data. Not all of these EIPs interact with the CDM, though a select few do (see the *CDM Message Summary* session below). These messages are dependent on the Person Basic EIPs having already created the Person object for which the data is being synchronized.

The Campus Solutions EIPs create the *Consumer* role for the Person object if it does not already exist. Also, when the *Consumer* role is added, any existing contact methods for that person are cloned and added to the Consumer Role. This is the only contact method interaction for Campus Solutions EIPs; all subsequent changes or additions are processed through Person Basic Sync.

Related Links

[PeopleSoft CRM for Higher Education](#)

Pers POI Sync

The Pers POI EIP is an important part of the CDM EIP structure. It is responsible for importing POI data for persons from PeopleSoft HCM or PeopleSoft Campus Solutions into CRM. Pers POI Sync is dependent on the Person Basic EIPs having already created the Person object for which the data is being synced.

Pers POI Sync creates the *POI* role for the Person object if it does not already exist. Also, when the *POI* role is added, any existing contact methods for that person are cloned and added to the *POI* role. This is the only contact method interaction for Pers POI Sync; all subsequent changes or additions are processed through Person Basic Sync.

Customer Data Model EIP Sequence

Due to the interdependent nature of the EIPs which are creating and modifying CDM information, it is vital that CRM receives and processes them in the correct order. Because the Person Basic EIPs create the foundation Person object, those messages must always be received and processed before subsequent Workforce or Campus EIPs for that same person. Failure to do so can result in data loss, inconsistent data between the CRM and the source system, or both.

To ensure that the messages are received and processed in the correct order, the EIPs are delivered in a single ordered message queue. Messages should not be removed from this queue.

CDM Message Summary

This table lists the delivered CDM messages:

| Message Name | Publishing Product(s) | Creates Role | Message Queue |
|------------------------------|-------------------------------|-------------------------|----------------------|
| PERSON_BASIC_SYNC | PeopleSoft HCM or Third-Party | 1 – Individual | PERSON_DATA |
| PERSON_BASIC_FULLSYNC | PeopleSoft HCM or Third-Party | 1 – Individual | PERSON_DATA |
| WORKFORCE_SYNC | PeopleSoft HCM | 4 – Worker | PERSON_DATA |
| WORKFORCE_FULLSYNC | PeopleSoft HCM | 4 – Worker | PERSON_DATA |
| PERS_POI_SYNC | PeopleSoft HCM | 88 – Person of Interest | PERSON_DATA |
| CS_TESTSCORES_FULLSYNC | PeopleSoft Campus Solutions | 9 - Consumer | PERSON_DATA |
| CS_ADM_APPL_DATA_FULLSYNC | PeopleSoft Campus Solutions | 9 – Consumer | PERSON_DATA |
| CS_ADM_PRSPCT_DATA_FULLSYNC | PeopleSoft Campus Solutions | 9 - Consumer | PERSON_DATA |
| SAD_ADM_APPL_DATA_SYNC | PeopleSoft Campus Solutions | 9 - Consumer | PERSON_DATA |
| SAD_ADM_PRSPCT_DATA_SYNC | PeopleSoft Campus Solutions | 9 - Consumer | PERSON_DATA |
| SAD_TEST_SCORES_SYNC | PeopleSoft Campus Solutions | 9 - Consumer | PERSON_DATA |
| RC_EBS_PERSON_INC_SERVICE | Oracle E-Business Suite | 1 – Individual | PERSON_DATA |
| RC_EBS_WORKFORCE_INC_SERVICE | Oracle E-Business Suite | 4 – Worker | PERSON_DATA |

Implementation Using Fullsyncs

You should perform FULLSYNC messages at implementation time to set up your PeopleSoft CRM database correctly.

To set up your database with FULLSYNC messages (recommended sequence):

1. Before you run the main EIPs, run these common EIPs:
 - a. Country
 - b. State
 - c. Currency
 - d. SetID Initialization
 - e. Table Set Control Initialization
 - f. Location
 - g. Business Unit
2. Run the Person Basic Sync EIP.
3. Run the Workforce EIP group.
 - a. Department
 - b. Job Code
 - c. Workforce
4. Run the Person Competencies EIP group.
 - a. CM_TYPE
 - b. Rating Model
 - c. Competency
 - d. Person Competency
5. Inactivate the FULLSYNC messages and activate the corresponding SYNC messages.

SYNC messages always originate in PeopleSoft HCM or a third-party system and publish to PeopleSoft CRM. Thus, any field in PeopleSoft CRM that an EIP populates must be maintained from the originating source database, whether it is PeopleSoft HCM or a third-party system.

Note: If you create workers within PeopleSoft CRM, you must maintain these workers in CRM until you create them in an HR or third-party database.

Data Integrations

These topics discuss:

- Customer and contact data integration with PeopleSoft FSCM.

- Worker data integration with third-party systems.
- Product data integration.
- Bill and payment data integration.
- Other integration considerations.

Customer and Contact Data Integration with PeopleSoft FSCM

In PeopleSoft CRM, a *customer* can be either a company, a consumer, or a site that is associated with a company or consumer. A *contact* is any person who performs transactions on a customer's behalf.

Company, Consumer, Site, and Contact EIPs

Use the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIPs to synchronize customer information with other systems. When you implement these EIPs, application messages are published whenever a company, consumer, or site record in the PeopleSoft CRM system is added or modified. PeopleSoft CRM can also subscribe to these EIP application messages that are published when these records are modified in another system.

Note: CRM cannot publish a company with grandparent companies to SCM, because SCM only supports a two-level customer hierarchy, whereas CRM can support multi-level customer hierarchies. If you have implemented the CUSTOMER_COMPANY EIP and a company with grandparent companies is added in the Company component, this online message is issued:

SCM doesn't allow multi-level customer hierarchy, No message will be published

The CUSTOMER_CONTACT EIP enables you to synchronize customer contact information with another system. When you implement the CUSTOMER_CONTACT EIP, application messages are published when a contact record in the PeopleSoft CRM system is added or modified. CRM can also subscribe to CUSTOMER_CONTACT EIP application messages that are published when these records are modified in another system.

Important! You must market-enable the Company, Consumer, Site, and Contact EIPs before PeopleSoft CRM can send customer (company, consumer, and site) and contact data to other databases. Market-enabling enables you to specify what data the PeopleSoft CRM system sends to other systems for a specific market. For example, you might opt not to publish certain customer and contact data to an external system for the FSI market. At the minimum, you must specify a global market to interface all non-market specific data.

See [Market-Enabling Company, Consumer, Site, and Contact EIPs](#).

Site Considerations

Only CRM sites that are flagged with the bill-to or sold-to purchasing options are integrated as customers with PeopleSoft SCM. If a site is flagged as Ship To only then the site is integrated with PeopleSoft SCM as an address to the company with which the site is associated.

When you add the bill-to or sold-to flag to a ship-to site, the system publishes the site message to create a new customer in PeopleSoft SCM. However, if a customer already exists in PeopleSoft SCM, removing the bill-to and sold-to options from the site does not remove the customer information for that site in PeopleSoft SCM.

Specifying Customer ID and Contact ID Default Values

You must specify the system that owns the customer ID and contact ID and verify the automatic numbering for ID generation for each setID.

See [Understanding Enterprise Integration Technology](#).

Customer and Contact Integration with Other PeopleSoft Applications

Unlike PeopleSoft CRM, PeopleSoft Financial Management Solutions and PeopleSoft SCM do not distinguish between company, consumer, and site records. CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIP application messages to which these systems subscribe are all mapped to customer records with unique customer IDs in the PeopleSoft Financial Management Solutions and PeopleSoft SCM systems.

When customer records are added or modified in PeopleSoft Financial Management Solutions and PeopleSoft SCM, the system publishes application messages using the Customer EIP. These messages are mapped to companies in the PeopleSoft CRM system.

When a record that is created in PeopleSoft CRM is modified in PeopleSoft Financial Management Solutions and PeopleSoft SCM, the system uses the record key information (customer ID and setID) that is included in the application message that's reporting the change to derive the record's original business object ID in PeopleSoft CRM. This enables CRM to apply the changes that are reported in the application message to the corresponding company, consumer, or site record.

To ensure uniqueness of customer ID and contact ID between multiple PeopleSoft CRM databases, you must specify the system that owns the customer ID and contact ID and verify the automatic numbering for ID generation for each setID.

See [Establishing Primary ID Databases](#).

Note: The CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs enable you to maintain customer information in multiple databases. However, to simplify integration of customer information, choose one database as the system of record for customer maintenance, and use PeopleTools Applications Portal technology to support customer information inquiries from the other systems. If you maintain customer and contact information in multiple databases, you must consider additional design, planning, and integration steps.

Customer and Contact EIP Application Messages Processing Order

In PeopleSoft CRM, because contacts can be associated with a company, consumer, or site, the company, consumer, or site record should be created before the contact record. When you implement the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs, make sure that the application messages from the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIPs are processed before application messages from the CUSTOMER_CONTACT EIP when performing a FULLSYNC process.

Maintaining Customer and Contact Information in Different Databases

In PeopleSoft, customers exist in PeopleSoft CRM, PeopleSoft SCM, and PeopleSoft Financial Management Solutions. There are a number of ways to design the system to integrate between PeopleSoft CRM, PeopleSoft SCM, and PeopleSoft Financial Management Solutions. The simplest way to integrate customer primary information is to manage all customer maintenance out of one database and support

inquiry only on the other databases. Then you can use PeopleTools Applications Portal technology to access either system.

You might have a compelling business reason to maintain customer and contact information in different databases. For example, you may elect to have your front office users create customers in the PeopleSoft CRM database but want to use the Receivables payment processing options that are available only in Financial Management Solutions.

If you choose to maintain customer (company, consumer, and site) and contact information in different databases, you must:

- Define which database owns the customer and contact ID number assignment on the Primary ID DB Setup page.

By specifying an owner, the system will be consistent in assigning a unique customer or contact ID for a particular customer or contact across different databases.

- Set up defaulting for the **CRM Name Type** field on the Name Type Defaults page.

You cannot add new contacts or customers to the PeopleSoft CRM database through the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs unless you complete this step.

- Set up at least one PeopleSoft CRM market control code for interfacing CRM customer and contact data to other databases.
- Evaluate whether you plan to define customers as bill-to customers in PeopleSoft CRM.

In PeopleSoft SCM and PeopleSoft Financial Management Solutions, customers that you define as bill-to customers must also have a defined collector and credit analyst. To ensure that PeopleSoft CRM passes these required fields to PeopleSoft SCM and PeopleSoft Financial Management Solutions, select the **Collector/Credit Analyst Req** (collector/credit analyst required) check box on the Installation Setup table. This ensures that PeopleSoft CRM satisfies the required field edit that is needed to populate PeopleSoft Financial Management Solutions and PeopleSoft SCM. Set up defaulting of these values on the Interface Defaults page under Define Integration Rules.

- Manually keep the Collector and Credit Analyst table in PeopleSoft CRM in sync with the PeopleSoft Financial Management Solutions and PeopleSoft SCM Collector and Credit Analyst table.
- Establish a default support team code in PeopleSoft CRM for each setID to be used in when creating a customer.

In PeopleSoft SCM and PeopleSoft Financial Management Solutions, a default support team code is required for each customer. To satisfy the required field edit, PeopleSoft CRM enables you to set up a default value on the Interface Defaults page under Define Integration Rules. In addition, ensure that the value set up on the Default page also exists on the PeopleSoft SCM and PeopleSoft Financial Management Solutions system.

PeopleSoft FSCM Customer-Related Pages That Are Unavailable in PeopleSoft CRM

These pages in the PeopleSoft SCM or PeopleSoft Financial Management Solutions Customer component are not available in CRM:

- Vendor Info.

- Credit Profile - General.
- Credit Profile - Credit Check.
- Region Code Info.
- Subcustomer Info.
- Customer Group Info.
- Customer VAT Info (customer value-added tax information).
- Customer Notes Info.
- Attachments.
- Messages.
- User-Defined 1.
- User-Defined 2.
- Payment Options.
- Write-Off Info.
- Hierarchy.
- Product Catalog.
- Product Aliases.
- Additional Ship To Options.
- Ship Exception Dates.
- Carrier Acct Number (carrier account number).

Note: If the PeopleSoft CRM installation is integrated with either PeopleSoft SCM or PeopleSoft Financial Management Solutions, you can access these pages through those applications.

The Products component in PeopleSoft SCM and PeopleSoft Financial Management Solutions uses these customer components, which are not available in CRM:

- Dun & Bradstreet.
- MICR Information.
- Corporate Customer Tree.
- Vendor Information.
- Corporate Tree Messages.
- Customer EFT Name (customer electronic funds transfer name).
- Quick Customer Create.

Note: You can access these pages through PeopleSoft SCM or PeopleSoft Financial Management Solutions if the PeopleSoft CRM installation is integrated with those systems.

See the documentation for *PeopleSoft: Enterprise Components*.

Related Links

[Defining Consumer Information](#)

[Understanding Purchasing Options](#)

Worker Data Integration with Third-Party Systems

Use the Worker EIP to synchronize worker information with another system. In PeopleSoft CRM, workers are people who work for you. When you implement the Worker EIP, application messages are published when a worker record in the PeopleSoft CRM system is added or modified. PeopleSoft CRM can also subscribe to Worker EIP application messages that are published when these records are modified in another system. The Worker EIP enables PeopleSoft CRM to accept and create future dated workers that were created in another system and to which CRM subscribed.

Product Data Integration

Integrate product data using the PeopleTools Integration Broker. This technology enables both synchronous and asynchronous messages to be transmitted using one technology. The PRODUCT_SYNC and PRODUCT_FULLSYNC messages are used to both publish and subscribe to data between PeopleSoft CRM and PeopleSoft SCM or a third-party system.

Integrating from PeopleSoft SCM to PeopleSoft CRM

PeopleSoft CRM subscribes asynchronously to the PRODUCT_SYNC message that is coming from PeopleSoft SCM. This data is processed directly into the PeopleSoft CRM product tables using Component Interfaces (CIs).

A product package header record is added for any kit components that are received from PeopleSoft SCM.

Integrating from PeopleSoft CRM to PeopleSoft SCM

PeopleSoft CRM publishes the PRODUCT_SYNC message whenever product data is added, changed, or deleted through the Product Definition (PROD_DEFN), Product Package (PRODKIT_SUMMARY), Pricing (PROD_PRICE), Package Pricing (PRODKIT_COMPS_PRICE), Notes (PROD_NOTE), Relationships (PROD_RELATIONS_CMP), and Product Attributes by UOM (product attributes by unit of measure; PROD_UOM) pages.

The 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 allow packages within packages, package components that are themselves packages are also stripped from the message.

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

| <i>Type</i> | <i>Line Display</i> | <i>Line Data Model/EIP</i> |
|-------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|------------------------------------------------------------------------|
| 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. |
| 1-Package (Kit) (multilevel dynamic quantity) PROD_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. |

Integrating from PeopleSoft CRM to a third-party SCM database

PeopleSoft CRM publishes the PRODUCT_SYNC message whenever product data is added, changed, or deleted through the Product Definition, Product Package, Pricing, Package Pricing, Notes, Relationships, and Product Attributes by UOM components. Integration Broker passes the message to the subscribing system.

Bill and Payment Data Integration

PeopleSoft CRM integrates with Billing and Receivables to obtain billing information—invoices—and payments that are associated with a company, consumer, or contact. If a person is a contact of a company and that role is selected in the **Role** field in 360-Degree View, then the 360-Degree View EIPs retrieve invoices and payments for the company and not for the contact.

The PeopleSoft CRM 360-Degree View can display invoices and payments under those nodes in the 360-Degree View tree. When you define these types of nodes on the Define Node page in PeopleSoft CRM, you specify all of the necessary EIP details that are associated with that node.

To request invoices from PeopleSoft Billing, and for Billing to respond to the request, use the GET BILLS FOR 360 DEGREE VIEW EIP. This EIP consists of two application messages:

- BI_EIP360_REQ (request message)

- BI_EIP360_RSP (response message)

To request payments from PeopleSoft Receivables and for Receivables to respond to the request, use the GET ACCOUNT RECEIVABLES FOR 360 DEGREE VIEW EIP. This EIP consists of two application messages:

- AR_CRM_REQUEST (request message)
- AR_CRM_RESPONSE (response message)

All of the application messages that are used for integrating with 360-Degree View are synchronous.

PeopleSoft CRM passes the request parameters for the request application message using an application class method. This table lists the application classes that PeopleSoft CRM uses to pass the request parameters to Billing and Receivables:

| <i>PeopleSoft Application</i> | <i>Class ID</i> | <i>Class Path</i> | <i>Method Name</i> |
|--------------------------------------|------------------------|--------------------------|---------------------------|
| PeopleSoft Billing | EIP | RB_TD_360 | PopulateBillRequestMsg |
| PeopleSoft Receivables | EIP | RB_TD_360 | PopulatePaymentRequestMsg |

Performance Considerations

When you integrate large amounts of data with other systems, system performance is slowed. The following tips might help.

Data Maintenance in Multiple Systems

If you have both PeopleSoft CRM and PeopleSoft SCM databases, PeopleSoft recommends that you:

- Synchronize tables (such as Customer and Contacts) by running the FULLSYNC EIPs to perform a full batch publish to the subscribing system.

Note: In general, FULLSYNC messages first delete all existing data in the target record and then load a copy of the source record. For Company, Consumer, Contact, and Site FULLSYNC messages that come into PeopleSoft CRM, no delete occurs; the data is merged into the existing data instead. This ensures data integrity within the PeopleSoft CRM system.

- Update databases in the subscribing system by running SYNC EIPs to perform incremental updates.

SYNC messages modify, delete, or add only the data that a user affected while performing an individual transaction.

Cascading Addresses

You can set a system option that automatically updates addresses on related business objects whenever you update an address on a parent business object. When you enable this option, each update that occurs also triggers an EIP to publish the address change to PeopleSoft SCM.

See [Maintaining Contact Information for Business Objects](#).

Related Links

[Establishing Primary ID Databases](#)

[Setting Up Defaults for Integrating Customer and Contact Information](#)

[Market-Enabling Company, Consumer, Site, and Contact EIPs](#)

Setting Up Defaults for Integrating Customer and Contact Information

To set up defaults for integrating customer and contact information, use the Collector (COLLECTOR_TABLE), Credit Analyst (CR_ANALYST_TABLE), and General Options (RB_INSTALLATION) components.

These topics discuss how to define default values for integrating customer and contact information.

Pages Used to Set Up Default Values for Integrating Customer and Contact Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-----------------------------------------|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Collector Page | COLLECTOR_TABLE | Create and maintain collector codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM. |
| Credit Analyst Page | CR_ANALYST_TABLE | Create and maintain credit analyst codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM. |
| Support Team Code Page | TEAM_CODE_TBL | Create and maintain support team codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM. |
| Interface Defaults Page | RB_EIP_DEFAULTS | Specify default values on customer records for fields that are required for integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM. |
| Name Type Options Page | RB_NM_TYPE_DFLT | Specify default name type values to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM. |

| Page Name | Definition Name | Usage |
|-----------------------------|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>General Options Page</u> | RB_INSTALLATION | Specify default exchange rate codes to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM and ensure that required codes are available to the EIP. |

Collector Page

Use the Collector page (COLLECTOR_TABLE) to create and maintain collector codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.

Navigation:

Set Up CRM > Common Definitions > Customer > Collector

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize collector codes manually between PeopleSoft CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

Credit Analyst Page

Use the Credit Analyst page (CR_ANALYST_TABLE) to create and maintain credit analyst codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.

Navigation:

Set Up CRM > Common Definitions > Customer > Credit Analyst

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize credit analyst codes manually between PeopleSoft CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

Support Team Code Page

Use the Support Team Code page (TEAM_CODE_TBL) to create and maintain support team codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.

Navigation:

Set Up CRM > Common Definitions > Codes and Auto Numbering > Support Team Codes > Support Team Code

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize support team codes manually between PeopleSoft CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

Interface Defaults Page

Use the Interface Defaults page (RB_EIP_DEFAULTS) to specify default values on customer records for fields that are required for integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM.

Navigation:

Set Up CRM > Common Definitions > Integration Rules > Integration Defaults > Interface Defaults

When you create a customer or site record using the Company, Consumer, and Site components in PeopleSoft CRM, the system automatically populates the record with the values that you enter on the Interface Defaults page. Users can select alternate values for these fields using the Bill Options view of the Customer Roles page, which is available in each of the components.

Name Type Options Page

Use the Name Type Options page (RB_NM_TYPE_DFLT) to specify default name type values to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM.

Navigation:

Set Up CRM > Common Definitions > Integration Rules > Integration Defaults > Name Type Options

This example illustrates the fields and controls on the Name Type Defaults page. You can find definitions for the fields and controls later on this page.

PeopleSoft CRM requires name type codes to create all business object records; however, PeopleSoft Financial Management Solutions and PeopleSoft SCM do not require name codes. To ensure that records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM are populated with name types that are valid in CRM, you specify default name type values here.

See [Defining Business Object and Name Types](#).

| Field or Control | Description |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Company Name Type | Enter the default value to use for name type on company records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM. The system uses this value on customer records that are received through Customer (company, consumer, site) EIP application messages. |
| Person Name Type | Enter the default value to use for name type on contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM. The system uses this value on contact records that are received through Contact EIP application messages. |

General Options Page

Use the General Options page (RB_INSTALLATION) to specify default exchange rate codes to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM and ensure that required codes are available to the EIP.

Navigation:

Set Up CRM > Install > Installation Options > General Options

Select the **Collector/Credit Analyst Req** check box. This prevents Customer (company, consumer, and site) EIP application message failures in PeopleSoft Financial Management Solutions and PeopleSoft SCM that are due to missing collector or credit analyst field values.

Important! You must manually synchronize exchange rate codes between PeopleSoft CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP Application messages that include codes that are not available in the subscribing system will fail.

Market-Enabling Company, Consumer, Site, and Contact EIPs

To market-enable company, consumer, site, and contact EIPs, use the Market Control Codes (RB_MKT_CTL_DFN) and Market Installation Options (RB_MKT_CTL_TBL) components.

This topic discusses how to specify the markets that PeopleSoft CRM integrates with.

Pages Used to Market-Enable Company, Consumer, Site, and Contact EIPs

| Page Name | Definition Name | Usage |
|----------------------------------|------------------------|--------------------------------------------------------------------------------------------------------------|
| <u>Market Control Codes Page</u> | RB_MKT_CTL_DFN | Define market control codes for market-enabling the Customer (company, consumer, and site) and Contact EIPs. |

| Page Name | Definition Name | Usage |
|-----------------------------------------|------------------------|-----------------------------------------------------------------------------------------------------------------------|
| <u>Market Installation Options Page</u> | RB_MKT_CTL_TBL | Specify market options for a specific market or use with the Customer (company, consumer, and site) and Contact EIPs. |
| <u>Build CDM Interface Records Page</u> | RB_INT_BUILD | Run the Build CDM Interface Records Application Engine process (RB_INT_BUILD). |

Market Control Codes Page

Use the Market Control Codes page (RB_MKT_CTL_DFN) to define market control codes for market-enabling the Customer (company, consumer, and site) and Contact EIPs.

Navigation:

Set Up CRM > Common Definitions > Codes and Auto Numbering > Market Control Codes

Enter a market control code name and a description. Use the **Comments** field to add any more information. These control codes are used on the Market Installation Options page.

Market Installation Options Page

Use the Market Installation Options page (RB_MKT_CTL_TBL) to specify market options for a specific market or use with the Customer (company, consumer, and site) and Contact EIPs.

Navigation:

Set Up CRM > Install > Market Installation Options

This example illustrates the fields and controls on the Market Installation Options page. You can find definitions for the fields and controls later on this page.

Market Installation Options

Market Global

Market Installation Options Personalize Find First 1-2 of 2 Last

| *Market Control Code | Description | Option Activated |
|----------------------|-------------------------|------------------------------|
| CDMINTFC | CDM Interface Records | <input type="checkbox"/> + - |
| CRCARD | Credit Card Information | <input type="checkbox"/> + - |

| Field or Control | Description |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------|
| Market Control Code | Select the market control code. Note: <i>CDMINTFC</i> is the market control code for CDM interface records. |
| Option Activated | Select to activate the code. |

Note: Use this page for market-enabling credit card information as well.

Build CDM Interface Records Page

Use the Build CDM (Customer Data Management) Interface Records page (RB_INT_BUILD) to run the Build CDM Interface Records Application Engine process (RB_INT_BUILD).

Navigation:

Set Up CRM > Common Definitions > Integration Rules > Integration Utilities > Request Processes > Build CDM Interface Records

Click **Run** to run the Build CDM Interface Records process, which populates the interface records.

Establishing Primary ID Databases

This topic lists prerequisites and discusses how to set up primary ID databases.

Pages Used for Establishing Primary ID Databases

| Page Name | Definition Name | Usage |
|---------------------------------|------------------------|------------------------------------------------------------------|
| <u>Primary ID DB Setup Page</u> | RB_IDMASTER | Designate which systems have the source (or primary) object IDs. |
| <u>XML Test Utility Page</u> | RB_XML_TEST | Test calls between remote databases. |

Prerequisites

You must first set up number type codes that relate object IDs to databases.

Primary ID DB Setup Page

Use the Primary ID DB Setup (primary ID database setup) page (RB_IDMASTER) to designate which systems have the source (or primary) object IDs.

Navigation:

Set Up CRM > Common Definitions > Integration Rules > Remote Data Access > Primary ID Owner > Primary ID DB Setup

This example illustrates the fields and controls on the Primary ID DB Seup page

Primary ID DB Setup

Primary ID DB Setup

1-1 of 1

| | | | |
|------------------------|----------------------|-------------------------|-------------------------|
| Number Type | Primary Database URL | | |
| <div><div></div></div> | <div></div> | <div><div>+</div></div> | <div><div>-</div></div> |

Save

Important! Use the Primary ID DB Setup page to indicate the location of the primary database that is responsible for issuing identifiers for customers, contacts, and so on. You *must* do this on all databases in the community except the primary. Failure to do so may result in duplicate customer and contact identifiers.

| Field or Control | Description |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Number Type | Select the objects whose IDs will be generated by the primary database that appears in the Primary Database URL (uniform resource locator) field. You can select the database for generating IDs for customers, contacts, products, sales orders, and quotes. |
| Primary Database URL | Enter the database URL for the primary database. When an application must obtain an identifier, it checks this field to see if there is a value. If there is no value, then the system issues the identifier itself, because it is assumed that the database is the primary. If there is a value, the system contacts the remote primary database for the identifier. |

XML Test Utility Page

Use the XML Test Utility page (RB_XML_TEST) to test calls between remote databases.

Navigation:

Set Up CRM > Common Definitions > Integration Rules > Remote Data Access > XML Test Utilities > XML Test Utility

This example illustrates the fields and controls on the XML Test Utility page. You can find definitions for the fields and controls later on this page.

| Field or Control | Description |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Transaction | <p>Enter the identifier for the object whose ID generation you want to test. Enter <i>1</i> for customers, <i>2</i> for contacts, <i>3</i> for sales orders, <i>4</i> for quotes, and <i>5</i> for products. When you press Tab to exit the field, the system enters default values in the first three unlabeled text boxes.</p> <p>The first unlabeled text box displays the setID or business unit for which the autonumber is to be generated; modify this if you like. Do not modify the other fields.</p> <p>The second text box displays the next number to be generated. This is always <i>NEXT</i> by default; do not change the value.</p> <p>The third field displays the zero padding indicator: <i>Y</i> (yes) to suppress leading zeros or <i>N</i> (no) to include leading zeros. You can modify this if you like.</p> <p>The last two unlabeled fields are not used when testing autonumber generation.</p> |
| Test | <p>Click the Test button to fetch the next ID number from the external system. The result appears in the Text field. If the object's autonumbers come from the PeopleSoft CRM system (and not an external ID primary), the Text field displays the word <i>Local</i>.</p> <hr/> <p>Note: This test increments the number in the external system's database.</p> <hr/> |

Mapping Message Data to PeopleSoft CRM Records and Fields

This topic discusses how to map message data to PeopleSoft CRM records and fields.

Page Used to Map Message Data to PeopleSoft CRM Records and Fields

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|----------------------------------|-------------------------------|------------------------------------------------------------|
| <u>Message Data Mapping Page</u> | RB_CLAF_MAP | Map source fields to destination fields in PeopleSoft CRM. |

Message Data Mapping Page

Use the Message Data Mapping page (RB_CLAF_MAP) to map source fields to destination fields in PeopleSoft CRM.

Navigation:

Set Up CRM > Common Definitions > Process Automation > Message Mapping > Message Data Mapping

This example illustrates the fields and controls on the Message Data Mapping page. You can find definitions for the fields and controls later on this page.

Message Data Mapping

Message Name KP_KPI_ASMT_FACTS
***Status** Active
Effective Date 08/21/2002

Message Data Mapping
 Find | View All
 First 1 of 1 Last

Record To Update BC

Identification and Assignment

Fields to Update

| Record Field to Update | XML Tag Name | | |
|------------------------|-----------------|---|---|
| ASSESS_DESCR | ASSESS_DESCR | + | - |
| ASSESS_ID | ASSESS_ID | + | - |
| ASSESS_IMAGE_ID | ASSESS_IMAGE_ID | + | - |
| KPI_ID | KPI_ID | + | - |
| PCT_OF_TARGET | PCT_OF_TARGET | + | - |
| RESOLVED_VALUE | RESOLVED_VALUE | + | - |

Record Identification

| Record Field Name | XML Tag Name | | |
|-------------------|--------------|---|---|
| CUST_ID | OBJ_ID | + | - |

Message Row Identification

| XML Tag Name | XML Tag Value | | |
|----------------|----------------|---|---|
| PF_OBJECT_TYPE | CUSTOMERMASTER | + | - |

Note: You can define message mapping for message with single-level hierarchy only.

| Field or Control | Description |
|------------------|----------------------------------------------------------------------|
| Message Name | Displays the message against which you want to perform data mapping. |

| Field or Control | Description |
|-------------------------|------------------------------------------------------------------------------------------------------|
| Record To Update | Enter the record that needs to be updated upon receiving the message into the PeopleSoft CRM system. |

Fields to Update

| Field or Control | Description |
|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Record Field to Update and XML Tag Name | Select the fields to update along with the corresponding XML tags from the message that you plan to receive. The system updates the record fields with the value of the XML tag element from the received message. |

Record Identification

| Field or Control | Description |
|-------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Record Field Name and XML Tag Name | Select a record field and corresponding XML tag. This criteria identifies the rows that must be updated when PeopleSoft CRM receives the message from another system. The system uses these fields to construct the <i>where</i> condition depending on the record fields and values of the corresponding XML tags. |

Message Row Identification

| Field or Control | Description |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| XML Tag Name and XML Tag Value | <p>Select the XML tags and XML tag values for the given message. This determines whether the message row qualifies with the given criteria to update the information into PeopleSoft CRM.</p> <p>In a message that you plan to receive, you may not want all of the rows to go to PeopleSoft CRM. Using these fields, you can sparse (filter) those rows from the received message.</p> |

Message Mapping Example

Here is an example of a message:

```
<?xml version="1.0"?>
<KP_KPI_ASMT_FACTS>
  <Fieldpiece>
    <KP_KPI_PUBL_TBL class="R">
      <BUSINESS_UNIT type="CHAR"/>
      <PF_SCENARIO_ID type="CHAR"/>
    </KP_KPI_PUBL_TBL>
  </Fieldpiece>
</KP_KPI_ASMT_FACTS>
```

```

<FISCAL_YEAR type="NUMBER"/>
<ACCOUNTING_PERIOD type="NUMBER"/>
<KPI_ID type="CHAR"/>
<OBJ_ID type="CHAR"/>
<TRGT_RULE_TYPE type="CHAR"/>
<PF_OBJECT_TYPE type="CHAR"/>
<RESOLVED_VALUE type="NUMBER"/>
<ASSESS_ID type="CHAR"/>
<ASSESS_IMAGE_ID type="CHAR"/>
<ASSESS_DESCR type="CHAR"/>
<PERIOD_END_DT type="DATE"/>
<PCT_OF_TARGET type="NUMBER"/>
<STRETCH_GOAL type="NUMBER"/>
<CURRENT_TARGET type="NUMBER"/>
<CURRENCY_CD type="CHAR"/>
<RESOLVED_IND type="CHAR"/>
<KPI_CALCDTM type="DATETIME"/>
<KP_TREND_IND type="CHAR"/>
<QTD_VALUE type="NUMBER"/>
<YTD_VALUE type="NUMBER"/>
<YEAR_OVER_YEAR_PCT type="NUMBER"/>
<MONITOR_ONLY type="CHAR"/>
<DESCR type="CHAR"/>
<KP_USER_FLD1 type="CHAR"/>
<KP_USER_FLD2 type="CHAR"/>
<PS_OWNER type="CHAR"/>
</KP_KPI_PUBL_TBL>
<PSCAMA class="R">
  <LANGUAGE_CD type="CHAR"/>
  <AUDIT_ACTN type="CHAR"/>
  <BASE_LANGUAGE_CD type="CHAR"/>
  <MSG_SEQ_FLG type="CHAR"/>
  <PROCESS_INSTANCE type="NUMBER"/>
  <PUBLISH_RULE_ID type="CHAR"/>
  <MSGNODENAME type="CHAR"/>
</PSCAMA>
</FieldTypes>
<MsgData>
  <Transaction>
    <KP_KPI_PUBL_TBL class="R">
      <BUSINESS_UNIT>FSI01</BUSINESS_UNIT>
      <PF_SCENARIO_ID>1</PF_SCENARIO_ID>
      <FISCAL_YEAR>1998</FISCAL_YEAR>
      <ACCOUNTING_PERIOD>1</ACCOUNTING_PERIOD>
      <KPI_ID>1</KPI_ID>
      <OBJ_ID>200022</OBJ_ID>
      <TRGT_RULE_TYPE/>
      <PF_OBJECT_TYPE>CUSTMASTER</PF_OBJECT_TYPE>
      <RESOLVED_VALUE>11</RESOLVED_VALUE>
      <ASSESS_ID>11</ASSESS_ID>
      <ASSESS_IMAGE_ID>PS_COMPANY_ICN</ASSESS_IMAGE_ID>
      <ASSESS_DESCR>Green</ASSESS_DESCR>
      <PERIOD_END_DT/>
      <PCT_OF_TARGET>11</PCT_OF_TARGET>
      <STRETCH_GOAL>0</STRETCH_GOAL>
      <CURRENT_TARGET>0</CURRENT_TARGET>
      <CURRENCY_CD>USD</CURRENCY_CD>
      <RESOLVED_IND/>
      <KPI_CALCDTM/>
      <KP_TREND_IND/>
      <QTD_VALUE>4670</QTD_VALUE>
      <YTD_VALUE>4670</YTD_VALUE>
      <YEAR_OVER_YEAR_PCT>0</YEAR_OVER_YEAR_PCT>
      <MONITOR_ONLY/>
      <DESCR/>
      <KP_USER_FLD1>KPI</KP_USER_FLD1>
      <KP_USER_FLD2/>
      <PS_OWNER/>
    </KP_KPI_PUBL_TBL>
    <PSCAMA class="R">
      <LANGUAGE_CD>ENG</LANGUAGE_CD>

```



```

    <AUDIT_ACTN/>
    <BASE_LANGUAGE_CD>ENG</BASE_LANGUAGE_CD>
    <MSG_SEQ_FLG/>
    <PROCESS_INSTANCE>0</PROCESS_INSTANCE>
    <PUBLISH_RULE_ID/>
    <MSGNODENAME/>
  </PSCAMA>
</Transaction>
</MsgData>
</KP_KPI_ASMT_FACTS>

```

From this message and the mapping that is provided, you can determine the:

- Message name - KP_KPI_ASMT_FACTS
- Record to update

This message updates the BC table.

- Fields to update

The BC table fields ASSESS_DESCR, ASSESS_ID, ASSESS_IMAGE_ID, KPI_ID, and PCT_OF_TARGET are updated with the values of XML tags <ASSESS_DESCR>, <ASSESS_ID>, <ASSESS_IMAGE_ID>, <KPI_ID>, and <PCT_OF_TARGET> in the message.

- Record identification

Subscription code updates the row in the BC table if the CUST_ID field value equals the value of the XML tag <OBJ_ID> in the message.

- Message row identification

Message rows qualify if the value of the XML tag <PF_OBJECT_TYPE> is equal to *CUSTOMERMASTER*; otherwise, the message rows are ignored.

Importing Data into PeopleSoft CRM

Understanding the Data Import Application Engine Process (RBIMPORT)

These topics lists prerequisites and discuss:

- Data Import process steps.
- Matching SQL.
- When to use the Basics Data AE process to load basic data.

Prerequisites

Before you import data into PeopleSoft Customer Relationship Management (PeopleSoft CRM), ensure that:

- The input file is sorted in key field order. For example, when you import multiple contacts to the same company, you must sort the input file on the *Company* field. This prevents duplicate BO_IDs from being assigned to the same company when all the matching criteria you specified are not met.
- The PeopleSoft super user ID has CREATE TABLE privileges for dynamic table creates.
- You define the FTP server so that it can store import file attachments.

To do this, modify the RB_IMP_ATTACH URL identifier by using the URLs - URL Maintenance page in PeopleTools.

See *PeopleTools: System and Server Administration*.

- You define data import global settings.

Data Import Process Steps

The Data Import process enables you to:

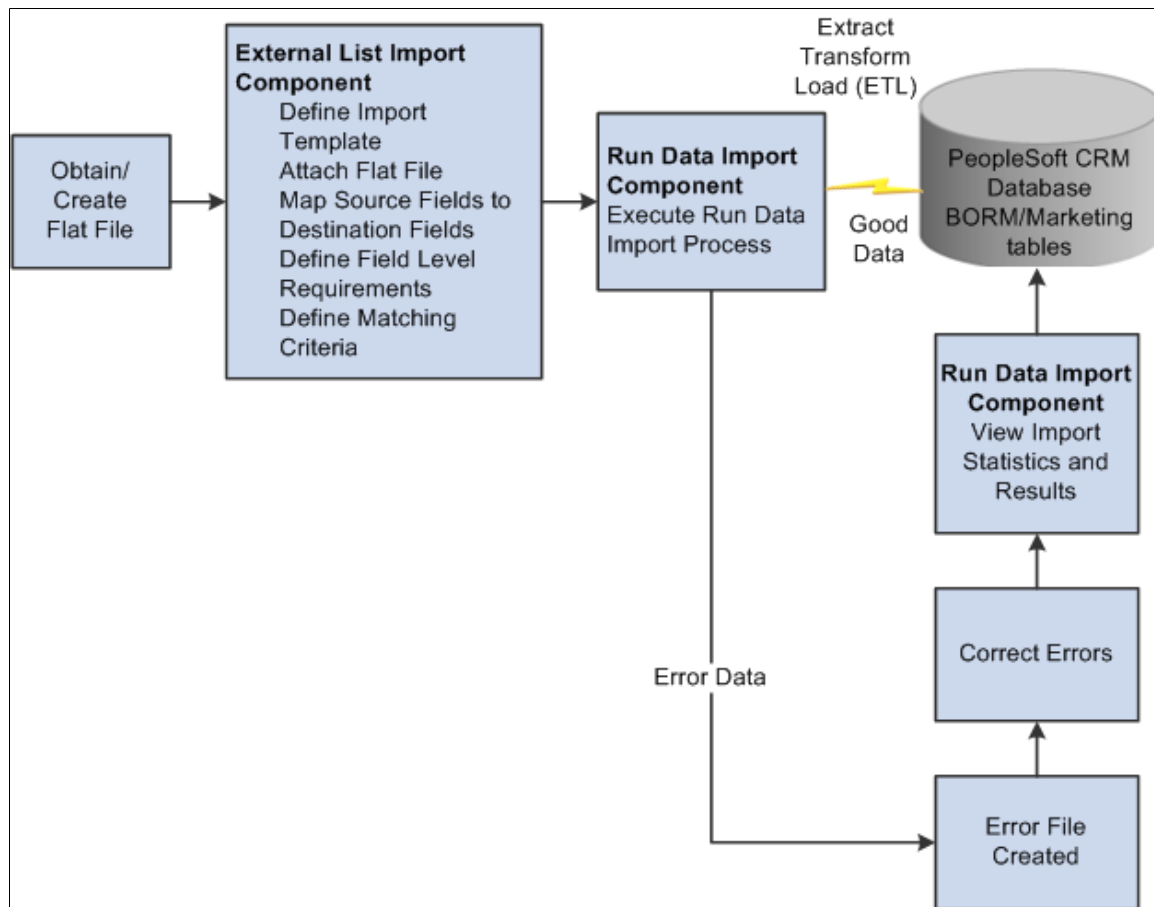
- Batch-load external data from other systems (in flat file format) into the PeopleSoft CRM database.

You do this mainly to load companies, contacts, and consumers. You also can generate marketing lists from the data that you load.

- Update existing individual and organization records with profile data for better targeting and personalization of marketing efforts.

Note: You cannot import profile fields of the *Text Block* data type, although you can import other fields in records that contain text block fields.

This diagram shows the steps of the data import process.



To import data into PeopleSoft CRM:

1. Create a flat file with an accepted delimiter (tab, comma, or semicolon) for the import.

Data import accepts flat files with rows that have a blank address, phone number, and email address.

2. Define an import template that uses the flat file.

The import template must specify:

- Identifying information, such as the template name, role of the imported data, import file fields, import file name, and optionally, audience.
- Specifications for mapping between input fields and database fields.
- Matching criteria, or the criteria for determining whether the imported data matches existing database information.

3. (Optional) Validate the import template.

You can validate the template setup against the data file contents by running the Data Import process with the **File Validation Only** check box selected.

The file validation step checks the file contents and structure and writes errors to an error file. You can use this file to correct any problems prior to importing data. Examples of validations are length of fields in the import file compared to field lengths that are in the database, compatibility of data types, and number of delimiters in each row.

4. Run the import process.

You use the Data Import page to identify the import file, schedule the run, and specify import parameters.

5. View the status of the import process.

On the View Import Status page, you can view import dates, times, and statuses.

6. View import results including statistics on the number of inserted, matched, updated, and in-error import rows.

7. Correct data errors that prevent records from successfully loading and run the Data Import process again.

Matching SQL

When the Data Import process runs, it dynamically builds SQL statements that match input files with database fields, based on the matching criteria that you enter. These statements are stored in the stage and matching tables. When you schedule the Data Import process, you can choose to keep these tables and later fine-tune the generated SQL to improve data import performance.

Important! You should perform this function only with the assistance of qualified consultants. One bad change may render the whole Data Import process nonfunctional.

Related Links

[Business Object Relationship Modelling](#)

When to Use the Basics AE Process to Load Basic Data

The Data Import process automatically updates the basic data tables if you have selected the **Process Basic Data Summary** option on the CDM System Options page. However, situations might arise when you cannot use the Data Import process, for example:

- During initial data load.
- When you enable a new role or relationship.
- If you are updating the BORM from legacy systems and choose not to use the PeopleSoft-provided APIs.

In these cases, you must use the Basic Data Load Application Engine process (BO_BASICS) to update basic data.

Related Links

[Business Object Relationship Modelling](#)

Setting Up Data Import Global Settings

To set up data import global settings, use the Data Import Global Settings (RB_IMP_GLB_SETUP) component.

This topic discusses how to define data import global settings.

Page Used to Set Up Data Import Global Settings

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-----------------------------------------------|-------------------------------|--------------------------------------------------------------|
| Data Import Global Setup Page | RB_IMP_GLB_PG | Define global settings that are for the Data Import process. |

Data Import Global Setup Page

Use the Data Import Global Setup page (RB_IMP_GLB_PG) to define global settings that are for the Data Import process.

Navigation:

Customers CRM > Data Import > Data Import Global Settings > Data Import Global Setup

This example illustrates the fields and controls on the Data Import Global Setup page. You can find definitions for the fields and controls later on this page.

Data Import Global Setup

Currency

USD

Code:

Last Object Id

1

Sequence:

Stage Table Generation

☒ Dynamic Record Creation

☐ Auto number

Stage Table Name Prefix:

STG

Last Stage Table Sequence:

1

Tablespace Name:

RDWORK

Dynamic Index Tablespace Name:

☒ Run Security AE

| Field or Control | Description |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Currency Code | Enter the default currency code, which the Data Import process uses for target tables that require a currency code. |
| Last Object Id Sequence | Enter a starting integer. Use this field when you create object IDs that are not system-generated. The format of generated IDs is <i>sequence number:counter</i> . For example, if the starting sequence number is 1, and you import a file with 100 companies, the format of the generated IDs is 1:1 through 1:100. A subsequent load of 50 company objects generates IDs 2:1 through 2:50. |

Stage Table Generation

| Field or Control | Description |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dynamic Record Creation | <div>Indicates that tables are dynamically created during the Data Import process, which executes many CREATE TABLE statements during processing. This is necessary to stage the imported data and to perform matching logic. You cannot edit this field.</div> <div>Note: The PeopleSoft super user ID must have Create Table privileges for the process to finish successfully.</div> |

| Field or Control | Description |
|----------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Auto number | Select to enable automatic number generation for imported data. |
| Stage Table Name Prefix | Enter the prefix for the staging tables. The staging tables are defined as <i>prefix_numeric value</i> (for example, STG_215). The system assigns numeric values in sequential order. |
| Last Stage Table Sequence | Enter a new sequence number, or leave the default, which is the last stage table sequence that the system creates. The system automatically assigns table sequences during the Data Import process. If you enter a new number, the system uses that number as its starting point in the process. |
| Tablespace Name | <p>Enter the tablespace name under which you want the system to create the staging tables.</p> <p>PeopleSoft CRM provides the predefined table space name (RDWORK).</p> <hr/> <p>Note: When performing the Data Import process on an Oracle or DB2 platform, you must define a SQL space name.</p> <hr/> |
| Dynamic Index Tablespace Name | <p>Select <i>PSINDEX</i> for Oracle databases and <i>PSSGIXPT</i> for DB2. Tablespace fields are enabled for DB2 and Oracle databases only.</p> <hr/> <p>Note: If you need to specify a different tablespace, you must manually enter it in Query Analyzer.</p> <hr/> |
| Run Security AE (Run Security Application Engine) | <p>Select this check box to run the security AE process against imported data. If this is not selected, imported data will not be available for applications that use application security.</p> <hr/> <p>Note: You can run the security AE against the entire database at a later time to make this data available.</p> <hr/> |

Defining Data Import Templates

To define data import templates, use the Data Import (RB_IMP_DATA_CONFSR_GBL) component.

These topics discuss how to:

- Access data import templates.

- Define data import templates.
- Define import files.
- Map source fields to target fields.
- Specify concatenation.
- Define matching criteria.
- Verify template creation.

Pages Used to Define Data Import Templates

| Page Name | Definition Name | Usage |
|----------------------------------------------------------|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Data Import Page</u> | RB_IMP_DATA_CONFSR | Access a data import template to modify or add a new template. |
| <u>Data Import - Step 1: Define Import Template Page</u> | RB_IMP_HEADER | Define general information and the role with which the imported data is associated. The role determines the target field tree that appears at mapping time. |
| Audiences - Audience Details | RA_LIST_MAIN | Describe the audience for the imported data. For use in PeopleSoft Marketing, you must specify an audience of type <i>Internal using Import</i> . |
| <u>Data Import - Step 2: Define Import File Page</u> | RB_IMP_FILESPEC | Associate the flat file of data and load the header fields from the flat file to the import template. Optionally, assign user-friendly labels to the header fields. |
| <u>Data Import - Step 3: Mapping Page</u> | RB_IMPORT_MAP | Map the source fields that are contained in the flat file to the target fields in the PeopleSoft CRM database and define the field requirements. |
| Data Import - Select Target Field | RB_SEL_MAP_IN_FLD | View the target fields in a tree format to assist with target field selection in the mapping process. |
| <u>Specify Concatenation Page</u> | RB_MAP_CONCAT | Specify the fields and values that are concatenated to form the target field. |
| <u>Data Import - Step 4: Matching Page</u> | RB_IMP_MATCH_ADV | Define the matching rules for the import data. For example, define which existing field or set of fields in the PeopleSoft CRM database you want to specify as constituting a match for an individual or organization record. |

| Page Name | Definition Name | Usage |
|----------------------------------------------------|------------------------|-------------------------------------------------------------|
| Matching Secondary Page - Select Target Field page | RB_MATCH_SEL_FLD | Select the database field where the import field is stored. |
| <u>Save Confirmation Page</u> | RB_IMP_CONF_PG | Verify import template creation. |

Data Import Page

Use the Data Import page (RB_IMP_DATA_CONFSR) to access a data import template to modify or add a new template.

Navigation:

Customers CRM > Data Import > Data Import Templates > Data Import

This example illustrates the fields and controls on the Data Import page. You can find definitions for the fields and controls later on this page.

Data Import

Use Sort to reorder the list of Import Templates. Use Filter to narrow the list of Import Templates.

| Data Import Template | Personalize Find View All | First 1-6 of 6 Last |
|-------------------------------|-------------------------------|---------------------|
| Import Template | Import Type | Import Status |
| Fall Appl. Manufacturers Show | Company/Contact | Active |
| Comdex Attendees | Company/Contact | Active |
| Consumer Import | Consumers | Active |
| Students - Senior Year | Consumers | Active |
| Auto Magazine List | Consumers | Active |
| Company/Contact Import | Company/Contact | Active |

Create a New Import Template

Search

Use Saved Search

[Advanced Search](#)
 Save Search Criteria
 Delete Saved Search
 Personalize Search

Import Template begins with
 Import Role =
 Import Status =

The appearance, behavior, and personalization options for this page are controlled by the search definition for the Data Import Template component.

| Field or Control | Description |
|-------------------------------------|---------------------------------------------------------------------------------------------------------|
| Create a New Import Template | Click to access the Data Import - Step 1: Define Import Template page and create a new import template. |

Data Import - Step 1: Define Import Template Page

Use the Data Import - Step 1: Define Import Template page (RB_IMP_HEADER) to define general information and the role with which the imported data is associated.

The role determines the target field tree that appears at mapping time.

Navigation:

- Click the **Create a New Import Template** button on the Data Import Template Search page.
- Select an existing template on the Data Import Template Search page.
- Click the **Go Back to Import Definition** button on the Save Confirmation page.
- **Customers CRM > Data Import > Run Data Import > Run Data Import Search**

Click the **View Import Definition** link on the Run Data Import page.

This example illustrates the fields and controls on the Data Import - Step 1: Define Import Template page. You can find definitions for the fields and controls later on this page.

Data Import

1 2 3 4

Step 1: Define Import Template

Import Template

*Description Company/Contact Import

*Import Role Company/Contact

Source ACZ

Import Status In Process ☒ Import Blank Date Values?

Import as Audience (optional)

*SetID CRM01

Audience Name Contact list

[Return to Search](#) Next >>

| Field or Control | Description |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Import Role | <p>Select the role to associate with the import template. All records that are in the file are imported into the CRM database with the selected role. Values are:</p> <ul style="list-style-type: none"> <i>Company</i>: Select for company records including sites for the company. <p>You must import sites in the context of a company by using the <i>Company</i> template.</p> <ul style="list-style-type: none"> <i>Company/Contact</i>: Select for individual records for persons who function as contacts for companies. <i>Consumers</i>: Select for persons who do not function as contacts for companies. <hr/> <p>Note: The role that you select here determines the objects to which you can map. For example, if you select <i>Consumer</i>, the only fields that are available to map to are those that are defined for the Consumer role.</p> <hr/> |
| Source | <p>Enter the source of the information that is contained in the flat file. This field is associated with the template and not with individual records that are in the file. To associate a source with each record, create a text profile field that is called Source and use the Data Import - Step 3: Mapping page to map a constant value into the field.</p> |
| Import Status | <p>Displays the import status that the system assigns when you begin to create an import template. Initially, the status is <i>In Process</i>. It stays as such until you complete the steps to define an import template, at which time it changes to <i>Active</i>.</p> |
| Next | <p>Click to access the Data Import - Step 2: Define Import File page and proceed to the next page in the import definition process.</p> |

Import as Audience

You can create audiences only for import data with the *Consumer* or *Company/Contact* role types.

The Data Import process imports only contact methods with the type of *Home* when creating audiences with the *Consumer* role. Other contact method types, such as *Business*, are ignored. This conforms to the requirements of the Marketing product.

| Field or Control | Description |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Audience Name | <p>Select an existing audience or click the Transfer to Audience button to define a new audience. The selected audience must have source of <i>Internal Using Import</i> and a status of either <i>In Design</i> or <i>Designed</i> to import the data into the PeopleSoft CRM database as a discrete audience.</p> <p>If you import the records as an <i>Internal Using Import</i> audience, you can use the audience immediately after import. However, you can't further segment the audience in the Audience Builder. If you want to do further segmentation rather than create an audience at the time of import, create a text profile field called Audience Source, and use the Mapping step to map a constant value in that field for all records. After import, create an internal audience by using the Audience Builder with the first condition <i>all records that are equal to the constant value that is mapped into the profile field called Audience Source</i>.</p> |

Data Import - Step 2: Define Import File Page

Use the Data Import - Step 2: Define Import File page (RB_IMP_FILESPEC) to associate the flat file of data and load the header fields from the flat file to the import template.

Optionally, assign user-friendly labels to the header fields.

Navigation:

Click the **Next** button on the Data Import - Step 1: Define Import Template page.

\

This example illustrates the fields and controls on the Data Import - Step 2: Define Import File page. You can find definitions for the fields and controls later on this page.

Data Import

1 2 3 4

Step 2: Define Import File

Import Template: Company/Contact Import

File Information

File stage_test3.csv

View File Delete File

Delimiter Comma

Skip Lines 1

Header Row 1

☒ Header ☐ No Header

File Field List Customize Find View All First 1-4 of 4 Last

| Field Name | Field Label |
|------------|-------------|
| Company | Company |
| Fname | Fname |
| Lname | Lname |
| WorkEmail | WorkEmail |

List Fields From File << Back Next >>

On initial access to this page when you are defining a new template, the **Attach File** button is available; the rest of the fields are empty. The **Delete File** and **View File** buttons are not available until you attach a file.

| Field or Control | Description |
|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Attach File and View File | Click to browse for and upload a file that contains import data. The Attach File button appears when you first access the page to define a new template; after you upload a file, the button text changes to View File . |
| Delete File | Click to delete the attached file. |

| Field or Control | Description |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Delimiter | Select the flat file delimiter <i>Comma</i> , <i>Semicolon</i> , or <i>Tab</i> . |
| Header and No Header | Select to indicate the presence or absence of a header row in the flat file. |
| Header Row | Enter the header row location in the field. If you do not enter a header row number, the system supplies <i>1</i> as the default. |

| Field or Control | Description |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Skip Lines | Enter the number of blank rows in the flat file. |
| List Fields From File | <p>Click to list the field names and labels from the flat file.</p> <p>If the flat file contains a header row, the system populates the Field Name column with the exact names of the fields (for example, <i>lname</i> and <i>fname</i>) that are contained in the header row of the flat file's header row. The system also populates the Field Label fields with the same information as shown in the field name fields.</p> <p>If the flat file doesn't contain a header row, the system populates these columns with <i>FIELD1</i>, <i>FIELD2</i>, and so on until all of the flat file fields are represented.</p> <p>Change the field labels to represent the names of the flat file fields in a more meaningful and understandable way. For example, you might change the <i>lname</i> field label to <i>Last Name</i>.</p> |

Data Import - Step 3: Mapping Page

Use the Data Import - Step 3: Mapping page (RB_IMPORT_MAP) to map the source fields that are contained in the flat file to the target fields in the PeopleSoft CRM database and define the field requirements.

Navigation:

Click the **Next** button on the Data Import - Step 2: Define Import File page.

This example illustrates the fields and controls on the Data Import - Step 3: Mapping page. You can find definitions for the fields and controls later on this page.

Data Import

1 2 3 4

Step 3: Mapping

Import Template: Company/Contact Import

☒ No Grouping

Step 3: Mapping Customize Find 1-4 of 4 First Last

| Mapping Action | Field Label | Select Target | Import Action | Required | Field Label |
|----------------|-------------|----------------------------------------------|---------------|-------------------------------------|-------------|
| Field | Company | Company.Business Object Name | Import | <input checked="" type="checkbox"/> | Company |
| Field | Fname | Contact.First Name | Import | <input type="checkbox"/> | Fname |
| Field | Lname | Contact.Last Name | Import | <input checked="" type="checkbox"/> | Lname |
| Field | WorkEmail | Busn_Email.Email Address | Import | <input type="checkbox"/> | WorkEmail |

Advanced Customize Find 1 of 1 First Last

| Mapping Action | Field Label | Specify Concatenation | Value | Select Target |
|----------------|-------------|-----------------------|-------|-------------------------------|
| Constant | | | | Select Target |

<< Back Next >>

When you access this page, the source field labels appear in the **Step 3: Mapping** scroll area, and the **Advanced** scroll area is collapsed.

You must map at least one source field from the flat file to a target field in the CRM database and you must map all required fields (required fields have an asterisk at the end of the field name in the folder tree view).

If you can perform one-to-one mapping of the source fields to the target fields, use the **Mapping** scroll area only.

To use a default constant in a target field, concatenate source fields into one target field, or enter a source field into multiple target fields, use both the **Mapping** and **Advanced** scroll areas.

No Grouping

To give you more control over what fields Data Import considers unique when two or more continuous rows have the same data, PeopleSoft CRM added the **No Grouping** check box.

For example, assume that you are importing the following data:

| <i>FIRST NAME</i> | <i>LAST NAME</i> | <i>EMPLID</i> |
|-------------------|------------------|---------------|
| Joe | Smith | 123 |
| Joe | Smith | 124 |

Data Import considers First Name and Last Name unique, and therefore inserts only one row and updates the EMPLID to 124. If you, however, select the **No Grouping** check box, the system inserts or matches on every row.

Selecting Target Fields

| <i>Field or Control</i> | <i>Description</i> |
|-------------------------|---------------------------------------------------------------------------------------------------------|
| Select Target | Click to select the database field that is updated by the input field or by an advanced mapping action. |

When you click this link, a hierarchical tree structure appears with required fields marked by an asterisk (*). The hierarchy differs depending on the role that you selected for the import template. Required fields are at each folder level. If any field in the folder is mapped, then you must map the required fields in that folder and in the folders above it. The required fields provide the concatenated key to the target fields.

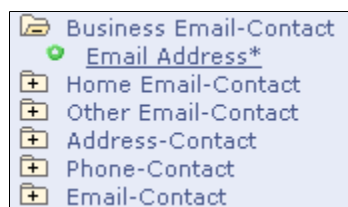
In the following example, the import role is *Company* and the source file field is *Work Email*. The *Business Object Name* field in the *Organization - Company* folder is required.

This example illustrates the Data Import - Select Target Field page (1 of 2).



An intermediate level in the hierarchy, *Contact*, is not shown. The **Lname** field in the *Contact* folder is required and selected. The target field, **Email Address**, is defined in the lowest level folder, *Business Email-Contact*.

This example illustrates the Data Import - Select Target Field page (2 of 2).



Mapping Source Fields to Target Fields

To map the source flat file fields to target fields, use the **Step 3: Mapping** region. Select a target for each field on the import file.

| Field or Control | Description |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ignore | Select to ignore this field and not import it when you perform the import process. This is useful for when you reuse import templates and want to import only a subset of the premapped fields. |
| Import | Select to import this field when you perform the import process. |

Advanced Mapping Actions

The advanced mapping actions enable you to update database records when a one-to-one correspondence does not exist between database fields and fields in the import file.

| Field or Control | Description |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Mapping Action | <p>Select one of the following values:</p> <ul style="list-style-type: none"> <i>Concatenate</i> Select to concatenate two or more fields or values to form the target field. <i>Constant</i> <i>Field</i> Select to map an already-mapped field from the import file to another target field. |
| Value | <p>Enter the constant value with which to populate the target field. For example, if <i>Country</i> is a field in the database, and all input records are for <i>France</i>, you would enter a value of <i>FRA</i>.</p> <p>This field appears only if you select a mapping action of <i>Value</i>.</p> <p>To enter data, time, or date values, consult PeopleTools documentation to determine the correct formats.</p> |
| Specify Concatenation | Click to access the Specify Concatenation page, where you can select the fields and values that are concatenated to form the target field. |

| Field or Control | Description |
|------------------|----------------------------------------------------------------------------|
| Field Label | Select the field to be map to the target field from the available choices. |

Specify Concatenation Page

Use the Specify Concatenation page (RB_MAP_CONCAT) to specify the fields and values that are concatenated to form the target field.

Navigation:

Select a mapping action of Concatenate in the **Advanced** region of the Data Import - Step 3: Mapping page and click the **Specify Concatenation** link.

This example illustrates the fields and controls on the Specify Concatenation page. You can find definitions for the fields and controls later on this page.

Specify Concatenation

Company.Revenue

| | | | | | | | |
|--------------------|-------------|-------|-----------|------|-------|----------|------|
| Fields | | | Customize | Find | First | 1-2 of 2 | Last |
| Concatenation Type | Field Label | Value | | | | | |
| Value | | | + | - | | | |
| Field | WorkEmail | | + | - | | | |

OK

Cancel

| Field or Control | Description |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Concatenation Type | Select <i>Value</i> to specify a constant in the Value column and <i>Field</i> to select from the import field labels in the Field Label list. |

Data Import - Step 4: Matching Page

Use the Data Import - Step 4: Matching page (RB_IMP_MATCH_ADV) to define the matching rules for the import data.

For example, define which existing field or set of fields in the PeopleSoft CRM database you want to specify as constituting a match for an individual or organization record.

Navigation:

Click the **Next** button on the Data Import - Step 3: Mapping page.

This example illustrates the fields and controls on the Data Import - Step 4: Matching page. You can find definitions for the fields and controls later on this page.

Data Import

1 2 3 4

Step 4: Matching

Import Template: Company/Contact Import

Match Rules

| Operator | Select Target | | |
|----------|----------------------------------------------|---|---|
| | Busn Email.Email Address | + | 🗑 |
| AND | Contact.Last Name | + | 🗑 |
| AND | Company.Business Object Name | + | 🗑 |

Add 'OR' Condition Delete this Condition

OR

| Operator | Select Target | | |
|----------|----------------------------------------------|---|---|
| | Company.Business Object Name | + | 🗑 |
| AND | Busn Email.Email Address | + | 🗑 |

Add 'OR' Condition Delete this Condition

Save Import Template << Back

This page enables you to specify the database fields that must match fields in the import file to update the database from the import file. If no match is found, the system inserts the incoming row as a new record in the CRM database. If a match is found, the system updates the existing record with new information from the file. You can override the update by deselecting the **Update Matched Records** check box when running the import process. In that case only, the system writes matched records to the error file.

New data never overwrites or updates an existing record's contact method fields (phone, email, and address); the new fields are appended as additional contact methods. All other types of mapped fields are updated or overwritten by the new data for matched records.

Warning! All fields, including email address, are case-sensitive for matching. To avoid instances in which a match is not found due to case-sensitivity, you should convert fields such as email address to lowercase prior to import. For example, convert Joe_Smith@ABC.com to joe_smith@abc.com before importing the file.

Matching Logic

Each template's matching criteria consists of one or more OR conditions, each of which contains an AND condition or a single field that must match. For example, in the condition shown, either all three of the fields, **Busn_Email.Email Address**, **Contact.Last Name**, and **Company.Business_Object_Name** must match their corresponding database fields or both of the fields **Company.Business_Object_Name** and **Busn_Email.Email Address** must match the database fields.

Note: You cannot nest conditions.

| Field or Control | Description |
|---------------------------|------------------------------------------------|
| Add 'OR' Condition | Click to add an OR condition to the statement. |

Note: You might see matching statements with conditions that are separated or nested using parentheses. These statements were developed in a previous version of PeopleSoft CRM. For upward compatibility, these statements act the same as they did in previous versions. However, if you make any changes to the statement, you must enter it in the new format

Save Confirmation Page

Use the Save Confirmation page (RB_IMP_CONF_PG) to verify import template creation.

Navigation:

Click the **Save Import Template** button on the Data Import - Step 4: Matching page.

This page displays:

- A message that indicates whether the template is saved successfully.
The Import status is set to *Active*.
 - The **Run Data Import** link.
Click this link to access the Run Data Import page and immediately run the import process.
 - The **Go Back to Import Definition** link.
Click this link to access the Data Import - Step 1: Define Import Template page, view the existing template, and make any necessary changes.
-

Editing Matching SQL

To edit matching SQL, use the Edit Matching SQL (RB_IMP_MATCH_EDIT) component.

These topics discuss how to:

- Select a statement for editing.
- Edit a statement.

Pages Used to Edit Matching SQL

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|----------------------------------------------------|------------------------|-------------------------------------|
| Edit Matching SQL Page | RB_EDIT_MATCHING | Select a SQL statement for editing. |
| Edit SQL page for Data Import Page | RB_EDIT_SQL | Edit a SQL statement. |

Edit Matching SQL Page

Use the Edit Matching SQL page (RB_EDIT_MATCHING) to select a SQL statement for editing.

Navigation:

Customers CRM > Data Import > Edit SQL in Data Import

This page enables you to view SQL statements and their processing time from the last run of the data import template. You can select a statement and edit it.

Edit SQL page for Data Import Page

Use the Edit SQL page for Data Import page (RB_EDIT_SQL) to edit a SQL statement.

Navigation:

Click the **Edit** button for any SQL statement on the Edit Matching SQL page.

This example illustrates the fields and controls on the Edit SQL page for Data Import page.. You can find definitions for the fields and controls later on this page.

Edit SQL page for Data Import

Operation INSERT INTO PS_RB_STG_TGT_VAL

SubSelect SELECT DISTINCT '810347954560917281803629052240' , 'BO_ID' , '' , '' ,
S1.BO_ID , T1.BO_ID

From Clause FROM PS_STG2 S1, PS_TGT_COMPANY_VW T1

Where Clause WHERE T1.SETID = 'CRM01' AND S1.BO_NAME = T1.BO_NAME AND NOT
EXISTS (SELECT 'X' FROM PS_RB_STG_TGT_VAL Z WHERE Z.RUN_CNTL_ID
= '810347954560917281803629052240' AND Z.FIELDNAME = 'BO_ID' AND
Z.VALUE_NBR_FROM = S1.BO_ID)

Use this page to cut and paste the SQL statement to Query Analyzer, tune it, and replace the SQL statement with the tuned statement.

For example, an administrator runs a Data Import job with the **Keep Tables** option selected. After the job finishes or terminates due to performance issues, the administrator can access this page to review the SQL statements to see how long each one took and start tuning those ones that took a long time.

When finished editing, the administrator saves the matching SQL and can rerun the same Data Import template.

Running the Data Import Application Engine Process (RBIMPORT)

This topic discusses how to run the Data Import process.

Pages Used to Run the Data Import Application Engine Process (RBIMPORT)

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------|-------------------------------|----------------------------------------------------------------------------|
| <u>Data Import Page</u> | RB_IMP_RUN_CONFSRC | Search for and view existing templates to use for the Data Import process. |
| Data Import | RB_IMP_RUN_DATA_PG | Run the Data Import process. |
| Import Multiple Files | RB_IMP_MULTI_FILES | Search for and upload additional files for data import. |

Data Import Page

Use the Data Import page (RB_IMP_RUN_CONFSRC) to search for and view existing templates to use for the Data Import process.

Navigation:

Customers CRM > Data Import > Run Data Import > Data Import

This example illustrates the fields and controls on the Data Import page (1 of 2). You can find definitions for the fields and controls later on this page.

Data Import

Import Template Consumer Import

File Information

File

Attach File

Process Additional Files

☐ File Validation Only

of Additional Files

0

Delimiter

Comma

☒ Header
 ☐ No Header

Schedule

☒ Now
 ☐ Future

Date

11/10/2014

Time

7:33:48AM

Skip Lines

1

Header Row

1

Character Set

ANSI

Import Options

*SetID

SHARE

☒ Update Matched Records
 ☐ ImportContactMethod as Primary
 ☐ Overwrite Many-rows Profile

Import Options

☐ Reuse Tables
 ☐ Keep Tables
 ☐ Delete Old Tables

File Field List

Import as Audience (optional)

Import Data

View Import Template

Return to Search

File Information

| Field or Control | Description |
|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Attach File and View File | Click to access a page where you can search for and upload the import file. After you attach a file, the button text changes to <i>View File</i> . |
| Process Additional Files | Click to upload one or more additional flat files. The system processes all attached flat files in parallel; this enables you to speed up the data import process by breaking up one large file into smaller files. |

| Field or Control | Description |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| File Validation Only | <p>Select to perform data validation tests of the Data Import process before you actually perform the process. This is a preventive step that is useful for new files from unknown vendors.</p> <p>This option runs the Data Import process to validate data types that are within the file, but it doesn't perform the data update. For example, if a character string is mapped to a number field or a mapped date is not in the correct format, an error occurs. The process also checks whether mapped fields are longer than the target field. The end result is an error file that contains all of the input rows with detailed error messages so that you can make corrections.</p> |
| Schedule | <p>Select Future and enter a date and time when the Data Import process is to run, or select Now. If you enter a past date, the system runs the process immediately.</p> |
| Character Set | <p>Select the input data file type, for example, <i>UTF8</i>. All installed character sets are available for selection.</p> |
| Update Matched Records | <p>Select to specify that target data be updated with source data from the flat file when a match exists between a source record and an existing target record in the database. The rules that you set up on the Data Import - Step 4: Matching page determine the match.</p> <p>If you do not select this check box, you must view the error file to see a list of the records that match but are not updated.</p> <p>See Data Import Page.</p> <hr/> <p>Note: Contact method fields are never updated with imported data; instead, the new information is added to the database.</p> <hr/> |

| Field or Control | Description |
|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Import Contact Methods as Primary | <p>Select to enforce that an imported contact method is checked as <i>Primary</i>. This overwrites existing primary flags in the PeopleSoft CRM database. If you do not select this check box (which is deselected by default), the system still imports all mapped contact methods, but none are flagged as <i>Primary</i>.</p> <p>Every PeopleSoft CRM business object supports multiple contact methods of each type. For example, a contact or consumer who is named John Doe can have multiple business email addresses, multiple home phone numbers, and so on. However, John Doe can have only one primary home phone number.</p> |
| Overwrite Many-Rows Profile | <p>Select to overwrite existing data if multiple rows of information can exist for a business object, for example, contact methods for a customer. If this check box is not selected, the Data Import process inserts new database records with the imported data.</p> |

| Field or Control | Description |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reuse Tables | Select to use existing stage and matching SQL tables that were generated in a previous run of the template. |
| Keep Tables | Select to retain the stage tables. This option is selected and disabled by default if the Reuse Tables option is selected. |
| Delete Old Tables | Select to remove all previous versions of the stage and matching tables, but keep the current one. This option is selected by default if stage and matching tables exist from a previous run. |
| Import Data | Click to run the Data Import process and open the Import Status group box, which displays the status of the Run Data Import process and contains a View Import Statistics link. |

File Field List

The **File Field List** region displays the fields that are associated with the import template. This enables you to verify whether the import works in the case where you access the Data Import process directly from the menu and use an existing template.

Import As Audience

The fields in this section function similarly to the identical fields on the Define Import Template page. Values that you enter override the value on the import template.

Import Status

The **Import Status** group box appears only after you click the **Import Data** button.

| <i>Field or Control</i> | <i>Description</i> |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View Import Statistics | Click to access the View Import Statistics page. Note: New contacts who are imported for existing companies are reported as updates because this updates the company's contact data. |

Viewing the Data Import Process Status

These topics discuss how to view the status of the Data Import process. You can:

- View the status of one data import process instance.
- View import statistics.
- View the data import process error file..

Pages Used to View the Data Import Process Status

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|------------------------------------|------------------------|-------------------------------------------------------------|
| <u>Data Import Page</u> | RB_IMP_VIEW_CONF SR | View instances, or runs, of the Run Data Import process. |
| Data Import | RB_IMP_VIEW_STATUS | View the status of one instance of the Data Import process. |
| <u>View Import Statistics Page</u> | RB_IMP_VW_STATS | View import statistics. |

Data Import Page

Use the Data Import page (RB_IMP_VIEW_CONF SR) to view instances, or runs, of the Run Data Import process.

Navigation:

Customers CRM > Data Import > View Import Status

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View File | Click to view the flat file that is used for the Data Import process. |
| View Error File | Click to download and view the error log file that the Data Import process creates. The error log contains details about the rows that are in error so that you can fix them and rerun the process. If the Update Matched Records option is not selected on the Data Import page, the error log also contains a listing of the records that match but are not updated. |
| View Import Statistics | Click to access the View Import Statistics page and view the import statistics, number of rows inserted, updated, and matched, and the total number of records that are processed. |

View Import Statistics Page

Use the View Import Statistics page (RB_IMP_VW_STATS) to view import statistics.

Navigation:

Click the **View Import Statistics** link on the Run Data Import page or the View Import Status page.

This page displays the import statistics from the Data Import process.

| <i>Field or Control</i> | <i>Description</i> |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View Process Monitor | Click to access the Process Monitor - Process List page and monitor the Data Import process in detail. <i>See PeopleTools: PeopleSoft Process Scheduler.</i> |
| View Error File | Click to download and view the error file that the Data Import process creates. The error file contains details about the rows that are in error so that you can fix them and rerun the process, if desired. |

Viewing the Data Import Process Error File

Access the error file.

The error file looks just like the input flat file except that after every row messages appear about what is wrong with the input row. Correct the problems with data on this error file and then rerun the Data Import process by using this file.

Running the Basics AE Process

These topics provide an overview of the Basics AE process (BO_BASICS) and discuss how to:

- Disable unnecessary roles, relationships, and contact methods.
- Optimize the database for performance.
- Submit the Basics AE process.

Page Used to Run the Basics AE Process

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|----------------------------------------|------------------------|-------------------------------------------|
| <u>Application Engine Request Page</u> | AE_REQUEST | Submit the Basics AE (BO_BASICS) process. |

Understanding the Basics AE Process

The Basics AE process reduces the complex tables and relationships contained in the BORM to two flat tables, BO_BASIC_IND (for data that is related to individuals) and BO_BASIC_ORG (for data that is related to organizations). For every customer business object that is enabled for Basics by role or relationship, the Basics AE finds all related business objects and writes the information to the relevant tables for use by the PeopleSoft Online Marketing and Marketing products.

For example, a customer company has four sites, each site has four contacts, and each contact has four contact methods. The process locates 64 (4 times 4 times 4) business objects to get contact information for the customer and organizes this information into a single BO_BASIC_IND record per role and relationship type keyed by the customer's business object identifier (BO_ID), role, and relationship ID. Rows for both the company and the site are populated in the BO_BASIC_ORG table.

On a large database, for example seven million rows, this process might run for several hours. You can significantly improve the performance of this process by enlisting the services of qualified implementation consultants or a database administrator (DBA). Working with these persons, you can tailor the Basics AE process to meet specific requirements and improve process performance.

The contact methods displayed in the **Audience** result grid are taken directly from the Basic Data tables. To show values for all the contact methods in the **Audience** result grid, Contact/Consumer contact methods must be set up to follow the corresponding mapping logic for Basic Data.

Step 1: When adding a person, you should ignore the description field, and concentrate on the Type fields. After doing that, remember that the first data entry you make by default becomes the primary contact information for all roles.

Step 2: Go to the Advanced Options section of the Address Book, and manually define the primary address, phone, and email info for each role.

Disabling Unnecessary Roles, Relationships, and Contact Methods

The Basics AE process dynamically reads all enabled roles, relationships, and mappings. To tailor the process for your particular requirements and improve process performance, you can disable or remove the following information:

- Basic data for roles.

You are not required to implement all delivered roles for an installation, or copy all implemented roles to basic data. To disable a role for basic data, deselect the **Enabled for Basic Data** option for the role on the Role Type page.

The roles that are enabled for basic data as delivered are:

- Company
- Site
- Worker
- Contact
- Individual Consumer

- Basic data for relationships.

You can also disable relationships for basic data if they are not used. Disable a relationship by deselecting the **Enabled for Basic Data** check box on the Relationship Type page. The relationships that are enabled for basic data as delivered are:

- Primary Contact / Company
- Contact / Company

- Remove basic data mappings for contact method purposes that are not needed. You can add or clone these mappings if they are needed in the future.

The basic data mappings are delivered with multiple contact method purpose types associated with each role and relationship. These are the contact method purpose types that are mapped as delivered, and they vary by role:

- Phone - Business
- Phone - FAX
- Phone - Home
- Email - Business
- Email - Home
- Address - Business
- Address - Home

To remove a contact method purpose from a role or relationship, display the role or relationship on the Basic Data Mappings page, scroll to the contact method purpose row, and use the **Delete Row** button.

Optimizing the Database for Performance

The DBA might perform some or all of the following actions:

Stripe the Disks on Which Data Resides

Striping is the process of dividing data into blocks and locating the blocks on different physical disks, which enables parallel database processing and speeds up the run.

Run SQL to Detect Problematic Data

The following data conditions can cause the Basics AE program to run inefficiently and can be detected and addressed prior to running the process:

- Duplicate primary contact methods.

Use this sample SQL to detect duplicates in the *Phone* table. You must run the same SQL for the *Address* and *Email* tables. To do so, replace each occurrence of the table name *PS_BO_SRCH_PHN* with *PS_BO_SRCH_ADD* (for address) and *PS_BO_SRCH_EML* (for email) before running.

```
SELECT BO_ID, ROLE_TYPE_ID, BO_REL_ID, COUNT(*) FROM PS_BO_SRCH_PHN BO_CM_VW →
WHERE BO_CM_VW.ROLE_TYPE_ID IN (2, 3, 4, 8, 9, 11) AND BO_CM_VW.BO_CM_START_DT⇒
<= { fn CURDATE() } AND BO_CM_VW.BO_CM_END_DT > { fn CURDATE() } AND BO_CM⇒
VW.CM_USE_START_DT <= { fn CURDATE() } AND BO_CM_VW.CM_USE_END_DT > { fn CURD⇒
ATE() } AND BO_CM_VW.PRIMARY_IND = 'Y' AND BO_CM_VW.PROFILE_CM_SEQ = (SELECT⇒
MAX(G2.PROFILE_CM_SEQ) FROM PS_BO_SRCH_PHN G2 WHERE G2.BO_ID = BO_CM_VW.BO⇒
ID AND G2.BO_CM_START_DT = BO_CM_VW.BO_CM_START_DT AND G2.CM_USE_START_DT = ⇒
BO_CM_VW.CM_USE_START_DT AND G2.CM_USE_ID = BO_CM_VW.CM_USE_ID AND G2.ROLE_T⇒
YPE_ID = BO_CM_VW.ROLE_TYPE_ID AND G2.BO_REL_ID = BO_CM_VW.BO_REL_ID AND G2.⇒
BO_REL_POSITION = BO_CM_VW.BO_REL_POSITION) GROUP BY BO_ID, ROLE_TYPE_ID, BO_R⇒
EL_ID HAVING COUNT(*) > 1
```

- Duplicate BO_ID in the Person table.

Run this SQL to detect duplicates in the Person table.

```
SELECT BO_ID, COUNT(*) FROM PS_RD_PERSON GROUP BY BO_ID HAVING COUNT(*) > 1
```

Gather Runtime Statistics

The Basics AE process step *CDMXSTAT* gathers and updates runtime statistics that are used by the relational database engine to optimize queries and find free space. This provides information to the engine about the distribution of data and improves the chances of index usage. This step is recommended after large numbers of rows are inserted or tables are reorganized, or when indexes are added or removed.

The DBA can disable this step (by making it *Inactive* in Application Designer) prior to a run if the statistics are already updated.

Drop and Rebuild Indexes

Drop table indexes and re-create them manually after the Basics AE process runs successfully. This is especially helpful on *DB2UNIX* or *DB2* platforms. You can drop the indexes manually or enable the Basics AE process step *CDMXDROP* to drop indexes

This is the list of indexes to drop and re-create:

- PS0BO_BASIC_IND
- PS1BO_BASIC_IND
- PSABO_BASIC_IND
- PSBBO_BASIC_IND
- PSCBO_BASIC_IND
- PSDBO_BASIC_IND
- PSEBO_BASIC_IND
- PS0BO_BASIC_TMP1
- PS1BO_BASIC_TMP1
- PS0BO_BASIC_TMP2
- PS1BO_BASIC_TMP2
- PSABO_BASIC_ORG_TMP2
- PSABO_BASIC_ORG
- PSBBO_BASIC_ORG
- PSCBO_BASIC_ORG

Inactivate Scheduled Jobs That Can Conflict with the Basics Process

The jobs *CM_FLTM* (for 8.9 and prior releases) and *CM_MAINT* (for release 9) are regularly scheduled to synchronize the normalized BORM tables to the flattened contact method tables. This improves access to contact methods for online processing, but can cause performance issues when run concurrently with the Basics AE.

To inactivate these jobs and any others that might cause data conflicts, use the PeopleTools Schedule JobSet Definitions page located under PeopleTools, Process Scheduler. Search for the job name and select *Inactive* in the **Status** field. Save the job definition.

When the Basics process ends, reactivate this job.

Application Engine Request Page

Use the Application Engine Request page (AE_REQUEST) to submit the Basics AE (BO_BASICCS) process.

Navigation:

PeopleTools > Application Engine > Request AE > Application Engine Request

See the documentation for *PeopleTools: Application Engine*.

