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PeopleSoft CRM 9.2: PeopleSoft Order Capture Applications

November 2025

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

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

Hosted PeopleSoft Online Help

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

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

Locally Installed 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

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- 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.

Typographical Convention	***Description***
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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Typographical Convention	*Description*
⇒	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)

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- 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

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

PeopleSoft Spotlight Series

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

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

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Chapter 1

Getting Started with PeopleSoft CRM Order Capture Applications

PeopleSoft Order Capture Applications Overview

PeopleSoft Customer Relationship Management (PeopleSoft CRM) consists of two applications which contribute to the interactive selling experience:

- *PeopleSoft Order Capture.*

  This internally facing application is a robust customer relationship management (CRM) order management tool that enables customer sales representatives (CSRs) or sales representatives to manage orders and quotes.

- *PeopleSoft Order Capture Self-Service.*

  This externally facing application enables web users—such as brokers, business customers, and consumer customers—to easily create and manage their own orders and quotes.

Order Capture Applications

Order Capture applications utilize:

- The CRM customer data model (CDM, also referred to as the business object relationship model [BORM]).

  The CDM (or BORM) is a powerful tool with which you can define the structure of your customer base and the relationships between various business entities such as companies, sites, resellers, or consumer families. The BORM enables businesses with complex business models to define this data structure within their CRM systems, which controls system behavior, workflow, and business rules according to that definition.

- The CRM product data model.

  This data model enables the definition and creation of products that the PeopleSoft software will support. You have numerous options in doing so such as, dynamic packages, nested packages, and product relationships.

  See “Understanding Products in PeopleSoft CRM” (PeopleSoft Product and Item Management).

- PeopleSoft Enterprise Pricer.

  This pricing tool uses the latest PeopleTools technologies to deliver a robust, high-performance engine. It integrates seamlessly with Order Capture applications to apply complex pricing structures and scenarios. PeopleSoft Enterprise Pricer has an intuitive user interface that is geared to use by your marketing managers.

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See PeopleSoft Enterprise Pricer.

- CRM catalog.

  CRM catalog functionality is available to Order Capture applications. With it, you can create region-specific catalogs, display template configurations, apply permission-filtering, and enable product comparisons. CRM catalogs integrate fully with Order Capture, and Order Capture Self Service. Catalog Search is powered by PeopleSoft Search.

  See “Understanding Catalogs” (PeopleSoft Product and Item Management).

Order Capture

Order Capture offers these features:

- Order and quote management.

  Order Capture delivers order and quote management functionality for supported product types.

- Order Capture workbenches.

  Order Capture workbenches are unique to the enterprise, and they perform three main functions. First, they are a central navigation point from which you can set up Order Capture and Order Capture Self Service, after you have defined your business units. The system consolidates specific setup tasks into one of three workbenches: Setup Workbench, Capture Type Workbench, and Integration Workbench. These workbenches all appear in the **Set Up CRM** > **Product Related** > **Order Capture** menu.

  Second, you can configure the 'look and feel' of the Order Capture runtime pages by defining and then selecting specific display templates.

  Third, you can create application class sets and plug the logic of those application classes into a workbench feature to create new events for your order capture business process.

  Note: “PeopleSoft CRM Red Paper - Understanding Application Classes in PeopleSoft Order Capture and PeopleSoft Order Capture Self Service” explains how to harness the power of application classes. This document is available in My Oracle Support.

- Functional Area Navigation (FAN) pages, personalizations, and hotkeys.

  CSRs can begin their interactive selling activities from a FAN page that provides one-click access to the main features of Order Capture. Customer Service administrators can personalize the look and feel of the order entry form for CSRs and CSRs can use hotkeys for rapid data entry.

- Integration with fulfillment.

  Order Capture provides integration with both PeopleSoft and third-party fulfillment systems or supply chain management products. For example, there is a tight integration with PeopleSoft Supply Chain Management (PeopleSoft SCM) so that order fulfillment and detailed maintenance activity is possible.

  Note: Integration points support the sending and receiving of orders, quotes, product availability, and order status information.

- Order capture business projects.

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Configurable business projects power order fulfillment. Business projects enable you to configure the phases, tasks, and events that occur once an order is submitted.

- Interactive Reports.

  Order Capture delivers instant, detailed business analytics information for revenue and metrics. User roles control access to enterprise-wide report information.

- Quick Create.

  Order Capture enables you to create customers, consumers, and contacts while you are in the midst of a transaction without having to navigate to the standard setup components to define customer information.

- Correspondence management.

  Order Capture can establish automatic correspondences using email or print for order or quote maintenance, or submission activity. Also, CSRs can generate correspondences manually by clicking the **Send Correspondence** button on the Entry Form page.

- Support for taxes, including value-added tax (VAT).

  Order Capture integrates with third-party software applications to calculate and display tax information directly on order forms.

- Integration with PeopleSoft Proposal Management.
- Bulk order creation and maintenance.
- Credit card integration.
- Freight integration with third-party software vendor.

See Order Capture Integrations.

Order Capture Self Service

In addition to most Order Capture features, Order Capture Self Service delivers:

- Support for self-service registration and profile and address maintenance.
- A Contact Us feature that includes real-time chat with a CSR.
- Security roles and privileges that control what a self-service user sees.
- Quick entry, to enable the rapid creation of orders.
- Order tracking functionality.
- Other standard self-service features, such as Checkout and Shopping Cart.

Order Capture Applications Business Processes

This diagram illustrates the primary Order Capture business processes, which identifies:

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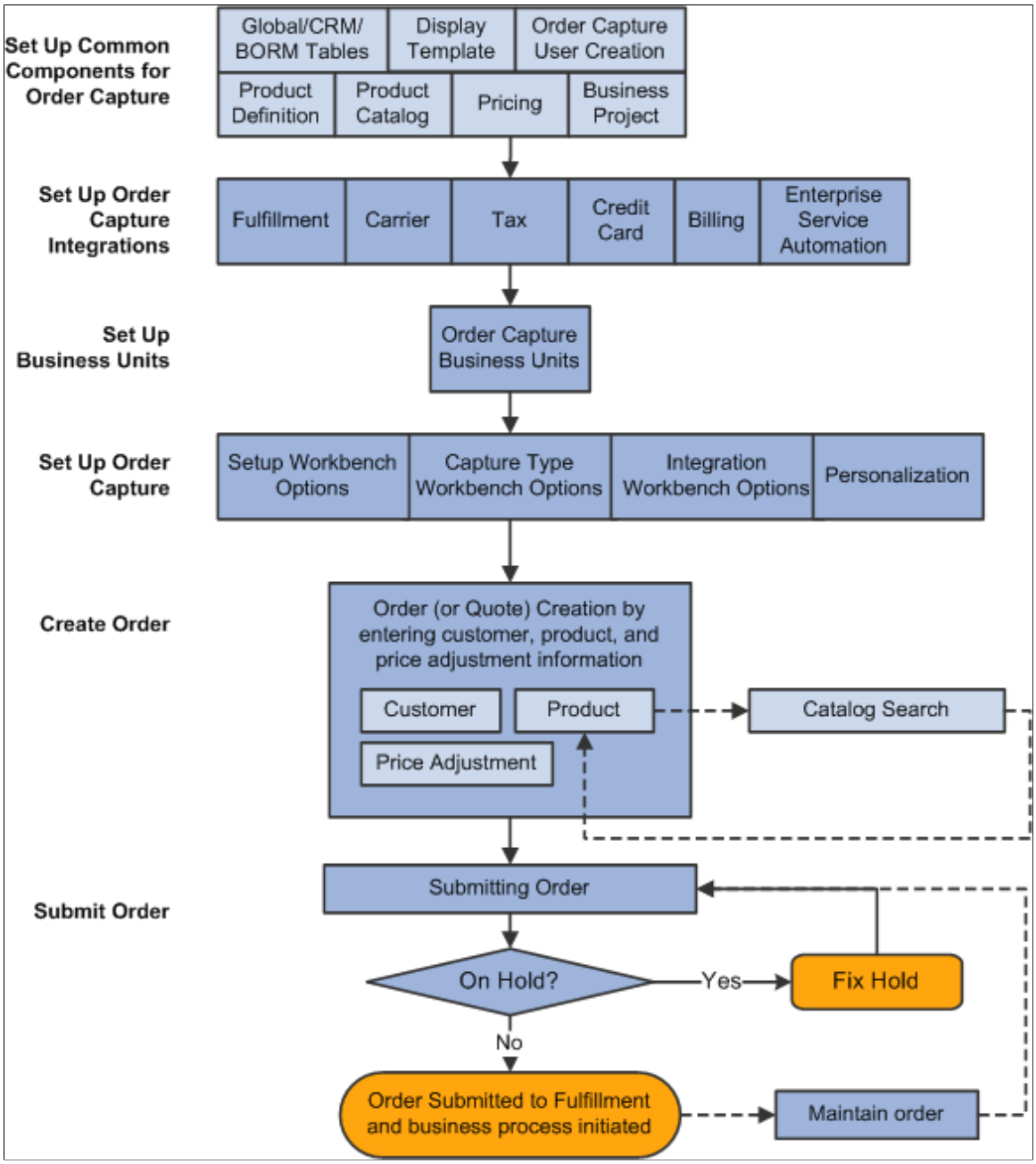
1. High-level implementation and setup tasks for which an Order Capture implementer is responsible.
2. Main business processes available for use by an Order Capture CSR.

Diagram illustrating the flow of setting up Order Capture applications and working with orders at runtime



We discuss these setup processes in the setup topics in this documentation. Business processes are discussed in the business process topics in this documentation.

Related Links

Understanding Business Units
Understanding Order Capture Setup
Products, PeopleSoft Enterprise Pricer, and Catalogs

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Understanding Order Capture Business Projects
Understanding Fulfillment Integration
Understanding Future Dated Orders
Understanding Order Capture
Understanding Bulk Order Enablement
Understanding PeopleSoft Proposal Management Integration

Order Capture Integrations

Order Capture integrates with most PeopleSoft CRM applications. Generally, this occurs in the form of other CRM applications channeling CSRs, call center agents, marketing managers, or sales representatives to the entry form where they can create an order or quote.

PeopleSoft CRM Applications

Order Capture integrates directly with these PeopleSoft CRM features or applications:

- 360-Degree View.
- PeopleSoft FieldService.

  Order Capture provides support for both service order generation and installed products.
- PeopleSoft Marketing.

  Order Capture displays campaigns that are targeted to your customers.
- PeopleSoft Sales.

  This integration supports the creation of a quote or order from a sales lead or opportunity.
- PeopleSoft Support.

  This integration enables call center agents to generate a sale from a case.

External Applications

Order Capture and Order Capture Self Service use integration points to connect to fulfillment systems and other third-party applications. PeopleSoft CRM integration points connect you to:

- PeopleSoft SCM or similar systems.

  This integration enables order fulfillment.
- Credit Card Integration Point.

  This enables integration with third-party credit card authorization and payment vendors directly from Order Capture and Order Capture Self Service.
- Carriers and tax calculation systems.

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Integration with third-party freight and tax calculation vendors enables order capture applications to calculate freight, sales tax, and VAT directly from an order.

Note: Supplemental information about how to set up third-party application integrations is located on the My Oracle Support website.

Refer to the Partners section of the Oracle corporate website for a list of Oracle-validated integrations provided by Independent Software Vendor (ISV) partners.

See Oracle Validated Application Integrations - Find a Partner Solution

Order Capture Applications Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding product documentation.

Order Capture applications also provide component interfaces to help you load data from your existing system into order capture tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the Order Capture components that have component interfaces:

Component	*Component Interface*	*Reference*
CARRIER	CARRIER_SCI_CI	See Setting Up Freight Integration.
RO_BUS_UNIT	RO_BUS_UNIT_CI	See Understanding Business Units.
RO_CATALOG	RO_CATALOG_CI	See Products, PeopleSoft Enterprise Pricer, and Catalogs.
RO_DEFN	RO_DEFN_CI	See Setting Up Order Capture Tables.
RO_DEFN_INTEGRATE	RO_DEFN_INTEGRATE_CI	See Defining Integrations and Mappings.
RO_TYPE	RO_TYPE_CI	See Defining Order and Quote Processing.
RB_SRTY_PRIV	RB_SRTY_PRIV_CI	See Understanding PeopleSoft Business Units.
RB_SRTY_PRIV_DELTA	RB_SRTY_PRIV_DELTA_CI	See Understanding PeopleSoft Business Units.

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Component	*Component Interface*	*Reference*
RB_SRTY_PRIV_DFLT	RB_SRTY_PRIV_DFLT_CI	See Understanding PeopleSoft Business Units.
RX_GUEST_REG_TMPLT	RX_GUEST_REG_TMPLT_CI	See Understanding PeopleSoft Business Units.
RX_REP_REG_TABLE	RX_REP_REG_TABLE_CI	See Understanding PeopleSoft Business Units.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources can be found in the Application Fundamentals documentation.

See Also

PeopleTools: Setup Manager

PeopleTools: Component Interfaces

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Chapter 2

Navigating in Order Capture

Navigating in Order Capture

Order Capture provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note: In addition to the Order Capture custom navigation pages, Order Capture provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

See Also *PeopleTools: Applications User's Guide*

Pages Used to Navigate in PeopleSoft Order Capture

This table lists the custom navigation pages that are used to navigate in PeopleSoft Order Capture.

Order Capture Setup Center

Use these pages to navigate in the Order Capture Setup Center:

Page Name	*Navigation*	*Usage*
Set Up Order Capture	**Set Up CRM**, then select **Order Capture Setup Center**	Set up and configure features, including products, pricing rules, and catalogs.
Products and Items	Click the **Products and Items** link on the Set Up Order Capture page.	Access the Inventory Item Definition, Product Definition, Product Unit of Measure, and Product Price pages to create and maintain products, packages, items, and pricing.
Pricing Rules	Click **Pricing Rules** link on the Set Up Order Capture page.	Access the Environment, Price List, Arbitration Plan, and Price Rule page to create multiple price lists and pricing rules.
Catalogs	Click the **Catalogs** link on the Set Up Order Capture page.	Access the Catalog Definition and Catalog Template Definition pages to create and maintain catalogs, templates, and installation options.

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Order Capture Center

Use these pages to navigate in the Order Capture Center:

Page Name	*Navigation*	*Usage*
Order Capture Center	**Order Capture Center**	Manage quotes and orders, and browse product catalogs.
360-Degree View	Click the **360-Degree View** link on the Order Capture Center page.	View details of all customer quoting and ordering activity.
Find Products	Click the **Find Products** link on the Order Capture Center page.	Browse and search all available products.
Quotes	Click the **Quotes** link on the Order Capture Center page.	Access the Add Quote and Search Quote pages to create and manage quotes.
Interactive Reports	Click the **Interactive Reports** link on the Order Capture Center page.	Access the Enterprise Order Revenue, Enterprise Order Metrics, Order Revenue, and Order Metrics pages to run Order Capture Interactive Reports.
Order	Click the **Order** link on the Order Capture Center page.	Access the Add Order, Add Bulk Order, and Search Orders pages to create and manage orders.

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Chapter 3

Defining Order Capture Business Units

Understanding Business Units

A business unit is an operational subset of an organization. Each business unit has its own way of storing information and has its own processing guidelines. You can use one business unit for all situations, or you can divide operations based on whatever criteria make the most sense. For example, you can create business units for different product lines or regions or even entry source. Order Capture transactions use business units as key identifiers. Once you determine how many business units you need and how to organize them, define them in the Order Capture system.

Note: PeopleSoft implementation personnel can help you to define an appropriate business unit structure.

In Order Capture, business units drive the business process of creating and tracking orders that customer service representatives (CSRs), sales representatives, and self-service customers create. To implement Order Capture, you must create order capture business units. These business units define processing rules to capture orders and enable the integration with other PeopleSoft applications, such as Order Management.

For integration purposes, ensure that business unit definition records are synchronized across all systems. Business unit definitions that you create in PeopleSoft CRM are available in PeopleSoft Supply Chain Management. You must make PeopleSoft Order Management and Inventory business unit definitions available to PeopleSoft CRM. To synchronize business unit records across your business enterprise, use the business unit enterprise integration point (EIP).

This is the process for defining business units:

1. Define global PeopleSoft business units, if you run multiple PeopleSoft applications.
2. Define PeopleSoft Customer Relationship Management (PeopleSoft CRM) business units.
3. Link PeopleSoft business units and PeopleSoft CRM business units to Order Capture.

   Note: For example, you can create a business unit in Order Capture, and connect that business unit to Sales later.

Before you create multiple order capture business units, ensure that you understand tableset controls, which you use to determine values for fields on transactional pages.

Related Links

"Understanding Business Units in PeopleSoft CRM" (Application Fundamentals)

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Defining Order Capture Business Units

This section discusses how to create order capture business units and specify order capture self service options.

Pages Used to Define Order Capture Business Units

Page Name	*Definition Name*	*Usage*
Order Capture Definition - Internal Page	BUS_UNIT_RO1	Create Order Capture business units, update existing business units, and establish default business units.
Order Capture Definition - Self Service Page	BUS_UNIT_RO2	Specify order capture self service settings.

Related Links

Understanding PeopleSoft Business Units

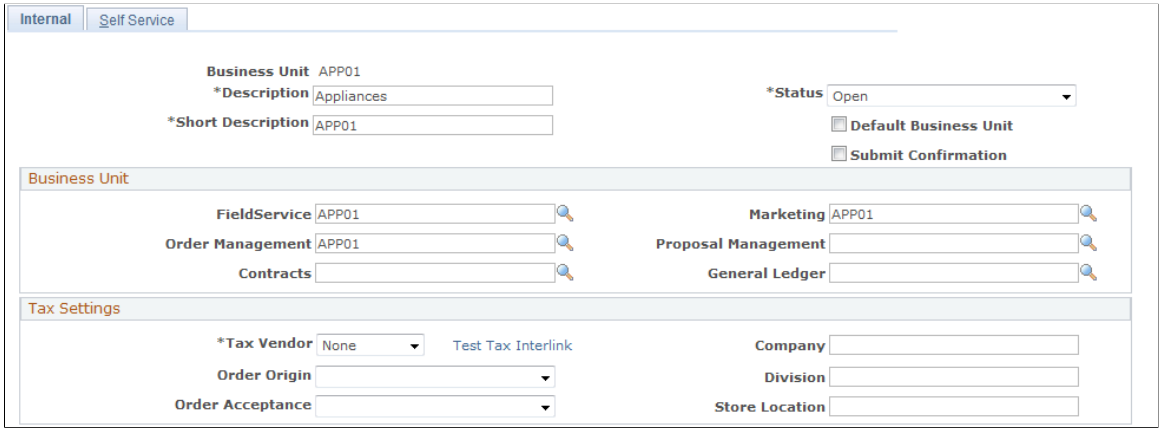
Order Capture Definition - Internal Page

Use the Order Capture Definition - Internal page (BUS_UNIT_RO1) to create Order Capture business units, update existing business units, and establish default business units.

Navigation:

Set Up CRM > **Business Unit Related** > **Order Capture Definition** > **Internal**

This example illustrates the fields and controls on the Order Capture Definition - Internal page (1 of 3).



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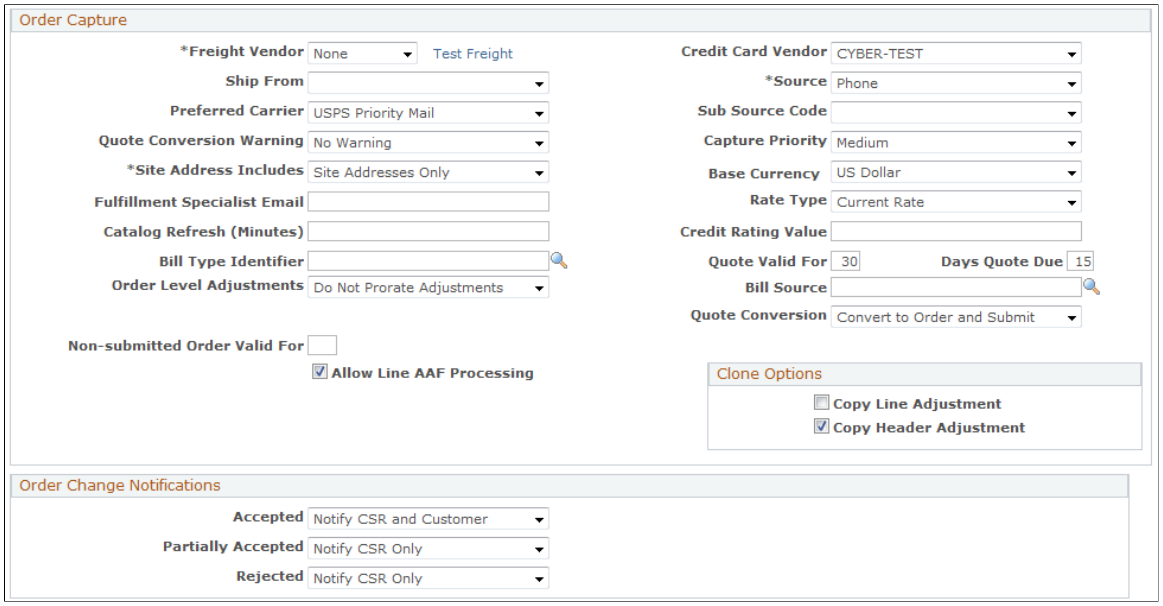
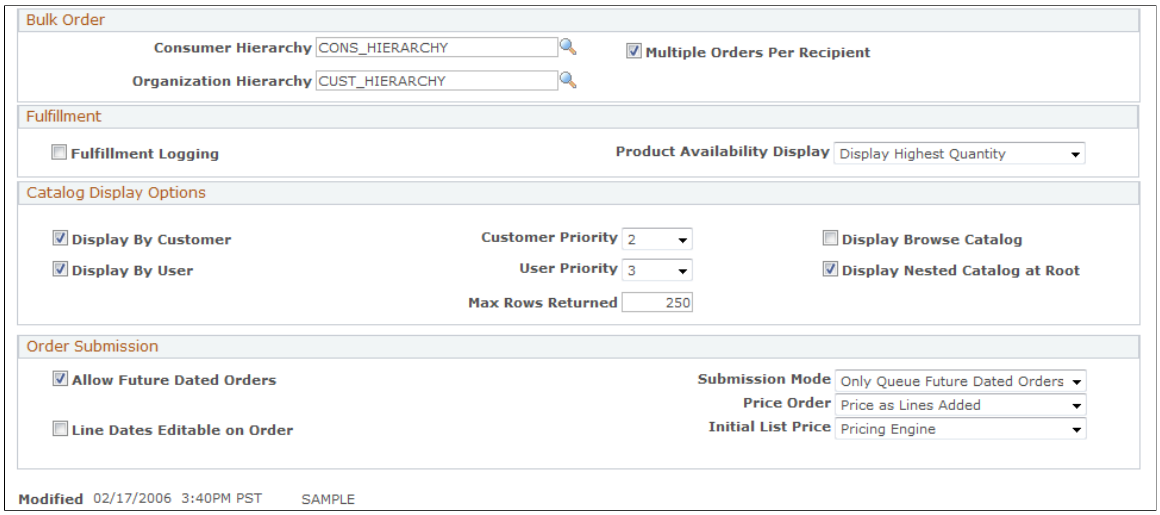
This example illustrates the fields and controls on the Order Capture Definition - Internal page (2 of 3).



This example illustrates the fields and controls on the Order Capture Definition - Internal page (3 of 3).



Field or Control	*Description*
Business Unit	Displays the business unit that you entered to access the page. **Note:** If the company uses more than one PeopleSoft application and defines the same business units across applications, use the same name for business units that are designed to share the same setID.
Description	Enter a description of the business unit. This description appears on the Order Capture Entry Form page and in other places where the business unit appears.

Field or Control	*Description*
Status	Select an *Open* or *Closed* status. You cannot process transactions for a closed business unit.
Short Description	Enter a brief description of the business unit. This description appears on the Order Capture Entry Form page and in other places where the business unit appears.
Default Business Unit	Select to specify that this business unit as the default business unit. If no order capture business unit is defined on the Overall Preferences page for the user who logged on, the system uses the default business unit that you identify as the default business unit for new orders and quotes. The system uses the same mechanism to determine a user's access to catalogs. **Note:** This check box appears only after you create a business unit. See “Understanding PeopleSoft CRM Security” (Application Fundamentals).
Default Set ID	Enter the setID that determines your preliminary tableset sharing setup. This setID determines the setIDs that the system assigns to each record group for the new business unit, and the setID that is assigned to a record group determines the tableset that provides values for the business unit. If you enter an existing setID, the system copies the set control definition of that business unit to the new business unit. **Note:** This field appears only when you open the page in Add a New Business Unit mode. It disappears after you create the business unit.
Submit Confirmation	Select to view a confirmation page once an order or quote is submitted. If the submission was successful, the CSR can either return to the order or quote just submitted or begin to create a new order or quote. If the submission was placed on hold, the CSR is able to link directly to the Holds page. If you clear this option, the system populates the header statuses automatically, and the Submit Confirmation page does not appear.
Create BU (create business unit)	Click to establish the setID controls for the order capture business unit based on the default setID that you specify. **Note:** This button appears only when you open the page in Add a New Business Unit mode. It disappears when you create the business unit.

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Business Unit

Field or Control	*Description*
FieldService	Enter the PeopleSoft FieldService business unit to map to this order capture business unit. **Note:** When ordering a product that requires installation, a service order is created in this PeopleSoft FieldService business unit.
Marketing	Enter the PeopleSoft Marketing business unit to map to this order capture business unit. Order Capture displays campaign offers that are associated with this Marketing business unit.
Order Management	Enter the PeopleSoft Order Management business unit to map to this Order Capture business unit. Order Capture maps to this Order Management business unit for order fulfillment.
Proposal Management	Select the PeopleSoft Proposal Management business unit with which Order Capture integrates. **Note:** PeopleSoft Proposal Management is part of a suite of Enterprise Service Automation (ESA) applications, within the PeopleSoft Financial Management Solutions product line. PeopleSoft CRM can to send PeopleSoft Proposal Management information when an engagement service product is included in a quote and receive pricing information when an engagement is fulfilled in PeopleSoft Proposal Management.
Contracts	Enter the PeopleSoft Contracts business unit to map to this Order Capture business unit. This only applies if you want to take advantage of the integration from Order Capture to PeopleSoft's billing system.
General Ledger	Enter the PeopleSoft General Ledger business unit to map to this Order Capture business unit. This enables the PeopleSoft General Ledger application to record billing information. **Note:** This only applies if you want to take advantage of the integration between Order Capture and PeopleSoft's billing system.

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Tax Settings

Field or Control	*Description*
Tax Vendor	Select a tax vendor. If you select *Taxware, Vertex,* or *WorldTax,* Order Capture integrates with the relevant third-party system for tax calculations. If you want value-added tax to be part of your pricing calculations during order entry, select *WorldTax.* If you select *None,* the system does not calculate taxes when creating orders or quotes. **Note:** You cannot show tax on an order or quote unless you select a vendor.
Test Tax Interlink	Click to verify that the tax integration is functioning correctly. **Important!** Make sure that the business interlink is properly configured before testing the integration. If your tax vendor is Vertex or Taxware, be sure to get the latest version of the your taxation product to work with your current PeopleTools version.
Company and **Division**	Enter codes that Taxware and Vertex use for reporting and tax calculation purposes. Check the vendor documentation for further information.
Order Origin	Enter the business unit where sales orders originate. Taxware references this location to calculate sales taxes for local jurisdictions that use this information in their taxing practices. Check the Taxware documentation for further information.
Order Acceptance	Enter the business unit where orders are accepted. Both Taxware and Vertex reference this location to calculate sales taxes. Check the Taxware or Vertex documentation for further information.
Store Location	(Optional) Enter the Store Location parameter used by third-party tax vendors. This is a 10 character maximum field.

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Order Capture

Field or Control	*Description*
Freight Vendor	Select a freight vendor type. Values are: *None:* No freight is calculated on the order. *External:* Order information is passed to an external vendor, and the calculated freight amount appears on the order.
Test Freight	Click this link to verify that the freight integration is functioning correctly.
Credit Card Vendor	Select a card vendor. If you select *3rd party,* the system submits credit card information to a third-party system for credit card authorization processing.
Ship From	Enter a ship-from location, assuming that all products ship from this location. This information is used when calculating taxes and freight costs.
Source	Enter an informational code that identifies the source of the order. For example, you could specify *Phone* if you receive most orders for this business unit by telephone. **Note:** The CSR can change this field's default value.
Sub Source Code	Select a sub source code that further classifies the source of the order. The system makes sub source codes available based on the selected source code. See Capture Setup Tables - Sub Source Mapping Workbench Page.
Preferred Carrier	Select the default carrier that you want to use when creating orders or quotes.

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Field or Control	*Description*
Quote Conversion Warning	Unless specified on the business unit definition, a quote that is converted to an order will automatically be submitted. When a quote that contains an engagement service product is converted, the engagement service is updated in the PeopleSoft Proposal Management system. If you want to display a warning for the CSR which indicates that the quote that is about to be converted to an order contains at least one Engagement Service product, then select *Display Warning*. If you want to bypass the warning, select *No Warning*.
Capture Priority	Select a capture priority of *Urgent, High, Medium,* or *Low* to specify the default priority for all orders that are created in the business unit. You can change the priority during order creation.
Site Address Includes	Select an order capture site address. The selection here includes all existing site addresses for a customer. You can increase the number of addresses available during order entry. Values are: • *Site addresses only:* Displays site addresses only. **Note:** This is the default selection. • *All customer addresses:* Displays the existing site addresses plus all other customer addresses. • *Customer Bill To addresses:* Displays the existing site addresses plus any billing addresses. • *Customer Ship To addresses:* Displays the existing site addresses plus any shipping addresses.
Base Currency	Enter the default currency. A base currency is required for the business unit, even if you are not transacting in foreign currencies.
Fulfillment Specialist Email	Enter an email address to which an email is sent if you create an order that contains a literature-type product.
Rate Type	Select the method that the system uses to set the exchange rate between currencies for Order Capture transactions.

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Field or Control	*Description*
Catalog Refresh (Minutes)	Enter a catalog refresh interval amount in minutes. When you view the product catalog, the system automatically checks when the last refresh occurred. If the interval since the last refresh is greater then the time that you enter here, the system forces a refresh.
Credit Rating Value	Enter a minimum credit rating value. If the customer's credit rating is less than this amount, the order that is associated with that customer is automatically placed on hold.
Bill Type Identifier	Select the bill type that you want associated with the setID. The bill type prompts on all bill type identifier codes that are synchronized from PeopleSoft Billing. The bill type identifier is a user-defined value in PeopleSoft Billing. Order Capture delivers CRM_ORDER as sample data. **Note:** On the Billing and Pricing Options page, the Bill Type field is optional. If it is not defined in PeopleSoft CRM, the billing plan in PeopleSoft Contracts sets the field based on the PeopleSoft Contracts business unit.
Quote Valid For	Enter the default number of days for which a quote is valid after the creation date. The system adds this number to the quote creation date to calculate the expiration date. Once the expiration date passes, the status changes to *Expired.* **Note:** You cannot convert expired quotes to orders.
Days Quote Due	Enter the number of days that the system automatically adds to the quote creation date to indicate a final date by which a quote should be converted to an order. A quote's due date is then set to the resulting date. For example, if you want quotes to elapse 30 days after creation, enter *30* here. **Note:** The number that you define here does not appear on the quote itself.
Order Level Adjustments	Select if you want to prorate adjustments or not.

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Field or Control	*Description*
Bill Source	Select the bill source that you want associated with the setID. The bill source prompts on all bill source identifier codes that are synchronized from PeopleSoft Billing. The bill source code is a user-defined value in PeopleSoft Billing. Order Capture delivers CRM_ORDER as sample data. **Note:** On the Billing and Pricing Options page, the Bill Source field is optional. If it is not defined in PeopleSoft CRM, the billing plan in PeopleSoft Contracts sets the field based on the PeopleSoft Contracts business unit.
Quote Conversion	Select *Convert to Order Only* if you want to give the CSR the chance to modify an order prior to submission. Select *Convert to Order and Submit* if you want quotes that are converted to orders to automatically be submitted. This is the default selection. **Note:** Your selection here will apply to all orders placed from this business unit.

Clone Options

Select **Clone Options** to determine adjustments that will be carried into the cloned order.

When **Order Level Adjustments** = **Do Not Prorate Adjustments**, both clone options are available.

When **Order Level Adjustments** = **Prorate Order Adjustment** , **Copy Header Adjustment** is selected and is read only.

When both the clone options are selected, both line level and order level adjustments are copied when an order or quote is cloned, when an order is converted to a quote, or when a quote is converted to an order.

When **Copy Line Adjustment** is checked, only the line adjustment is copied in both the order and quote.

When **Copy Header Adjustment** is checked, both line adjustment and order level adjustments are copied in a quote whereas only order level adjustments are copied in an order.

Field or Control	*Description*
Copy Line Adjustment	Select this option to carry the line adjustment into the cloned order.
Copy Header Adjustment	Select this option to carry the header adjustment into the cloned order.

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Order Change Notifications

The system can send order change notifications to specified parties when order maintenance occurs, and Order Capture receives a message from the fulfillment system.

Field or Control	*Description*
Accepted, Partially Accepted, and **Rejected**	Select the recipients that you want Order Capture to notify when the fulfillment system informs PeopleSoft CRM that order changes are fully accepted, partially accepted, or rejected. Values are: • *Notify CSR Only.* • *Notify CSR and Customer.* • *Notify Customer Only.* • *Notify Nobody.*

Bulk Order

On the Order Capture Definition page, you plug in relationship views for both consumers and organizations. The primary order/recipient order relationships are determined by the relationships that you establish in the Relationship Viewer.

Field or Control	*Description*
Consumer Hierarchy	Select a relationship view for a single consumer, or contact. This will determine all of the possible bulk order recipients at runtime by automatically populating all of the child relationships for the parent chosen here.
Multiple Orders Per Recipient	Select this check box to allow single recipients to receive more than one order. An **Order** field appears on the runtime page, enabling you to enter the number of orders you want to specify per recipient.
Organization Hierarchy	Select a relationship view for the company, or organization. When the end user enters a company name, it will prompt against the table you select here to determine the child relationships available.

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Fulfillment

Field or Control	*Description*
Fulfillment Logging	This flag enables logging of fulfillment data. When this flag is checked and the order is submitted, business project activity, such as phase task, is captured in the table RO_OB_LOG. The log contains fulfillment data for transactions that occur from the time the Fulfillment Logging check box was selected. Data from fulfillment activity prior to that time is not available.

Catalog Display Options

Field or Control	*Description*
Display By Customer and **Display By User**	Select the check box to indicate if catalogs should be displayed by User or by Customer. **Note:** When catalogs are displayed from the order, the list of authorized catalogs can vary depending on the selected customer and user logged in. When a customer is not selected on the order, the list of authorized catalogs will depend strictly on the user logged in. In that case, only catalogs that the user is specifically authorized for will be available.
Customer Priorityor **User Priority**	Select the priority to determine which catalog is displayed. The priority indicates which catalog takes precedence if more than one mode qualifies.
Max Rows Returned (maximum rows returned)	Enter the maximum number of items that can be returned in a product catalog search. By default, the value is set to 250. You can perform some testing to find out the optimal value for your organization. This setting helps to sustain performance on catalog search, especially when users perform searches without entering any search criteria (wild search). When a wild search happens, PeopleSoft search returns no results if the searched catalog contains more than 64,000 items and users need to refine the search. By limiting the number of rows to return in a catalog search, the system gets better search results (rather than getting nothing, in case of performing wild searches in huge catalogs) and performance.

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Order Submission

Field or Control	*Description*
Allow Future Dated Orders	Select to enable future dated order functionality. This enables the user to create orders that are scheduled to be fulfilled on dates in the future. The orders are queued until execution time when they are submitted in the background.
Line Dates Editable on Order	Select to enable the user to modify the order line start date and end date to be different than scheduled fulfillment date. **Note:** If this option is selected, dates are only editable in certain circumstances depending on the product.

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Field or Control	*Description*
Submission Mode	Select to control when the business logic for the order is launched. This enables a quicker submission processing if the business logic is not launched immediately on submission. Launching these processes in the background and not directly upon submission makes for a quicker response to the user. A process triggered by the *QUEUED_ORDER_SUBMISSION* Schedule JobSet Definition can submit orders in the background. **Note:** For any option other than *Do Not Queue* , you must activate the *QUEUED_ORDER_SUBMISSION* Schedule JobSet Definition. This JobSet Definition starts the business projects in the background for queued orders. • *Do Not Queue* Do not queue the orders. Start order business logic immediately upon submission. • *Only Queue Future Dated Orders* Queue orders only if their **Scheduled Fulfillment Date** is in the future. These queued orders are automatically submitted by the *QUEUED_ORDER_SUBMISSION* JobSet at a future calculated execution date and the business logic run. For this option, the *QUEUED_ORDER_SUBMISSION* JobSet can be run once a day to pick up orders that are waiting in the queue and are ready to be submitted based on their execution date. • *Queue All* Queue all orders regardless of the Scheduled Fulfillment Date. The orders are automatically submitted in the background by the *QUEUED_ORDER_SUBMISSION* JobSet and the business logic run. For this option, the *QUEUED_ORDER_SUBMISSION* JobSet should be run at a frequent interval to pick up orders that are waiting in the queue and to submit them in the background. See *PeopleTools: Process Scheduler*

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Field or Control	*Description*
Price Order	The Price Order flag controls when the pricing engine will be called to retrieve the unit price. Products' list prices can be retrieved by the pricing engine, from the product definition model, or not at all depending on the option selected for displaying initial list price. List prices will always be repriced upon order submission. *Price as Lines Added:* This is the default, and will cause a reprice of the entire order as each new line is added to the order. This will keep the order total up-to-date as new lines are added, however, it is the least efficient method of pricing and should only be the choice when orders are seldom over 20 lines. *Price at Save:* This pricing option will not price the order until the order is saved, or when the **Update Totals** button is pressed. As new lines are added to the order, only their list prices are retrieved. The order totals are not updated until pricing is called. This method is preferred when orders contain a large number of lines. *Price at Update Totals:* This pricing option will only price the order when the **Update Totals** button is pressed. As new lines are added to the order, only their list prices are retrieved. The order totals are not updated until pricing is called. Also, the order may be saved without calling pricing. This option may be preferred when very large orders are entered, and the order is saved along the way. The save will be much faster as pricing is not involved.
Initial List Price	Select from where list prices of products are retrieved to be displayed initially on orders. *Pricing Engine:* (default) Display prices returned from PeopleSoft Enterprise Pricer. If the selected price order is *Price as Lines Added*, this is the only option available. *Product Model:* Display prices that is established from the Product Price component. This option yields better performance than the pricing engine option. *Show No Price:* Display no prices. If this option is selected, each order line shows a zero price until the pricing engine is invoked at submit or update totals. This option yields better performance than the product model option.

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Chapter 4

Setting Up PeopleSoft Order Capture

Understanding Order Capture Setup

Order Capture is configurable and supports industry solutions without a need to modify application logic. This is achieved through configuration of the order capture entry forms and order capture business processing logic. Order maintenance functionality, in particular, requires configuration capabilities to enable you to determine the states at which an order capture is eligible for maintenance (change or cancellation).

The majority of Order Capture setup is performed in three individual workbenches:

- Setup
- Capture Type
- Integration

After you define toolbar preferences, create application class sets, and set up third-party integrations, you can perform all the remaining setup tasks here as well.

The three workbenches bring together most setup elements. Together, they enable configuration of the capture forms and the business logic. You can configure workbenches by capture type, such as order and quote. Capture types can take on different forms and different business processing logic depending upon the events you select, their sequence, and the business project that you specify for each.

You can configure and control order maintenance activities by capture status, at both the header and the line levels. Aesthetics are also controlled here, as you also configure presentation and labeling of capture forms by type.

Note: Although these workbenches combine both mandatory and optional steps, you are not *required* to perform any setup steps if you apply the delivered system data. This system data prepopulates all the workbench pages, and the values comprise all of the workbench settings that are necessary to get the Order Capture system up and running.

Understanding Toolbar Configuration

You can configure the toolbar that you use for order and quote processing as well as the subtabs and page labels that appear on the order entry forms. The toolbar feature provides a simple way to navigate to different pages and sections within the same component. You can set up the toolbar so that, in an order form, users can jump from one area to another—such as from Billing on the Order Entry form to Interaction History on the History page—by selecting the relevant name.

This table summarizes toolbar configuration features:

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Feature	*Description*
Toolbar buttons	Toolbar buttons include PeopleTools actions and Order Capture specific actions. Buttons such as **Save, Refresh, Add, Next in List, Previous in List, Return to Search,** and **Update/Display** map to corresponding buttons in PeopleTools. Order Capture buttons perform application-specific actions, such as cloning an order.
Page subtabs	Page subtabs are links that appear on a component page above the toolbar. Each subtab links to sections of a page that are defined based on a page's group boxes. In Order Capture, you can use page subtabs to provide users with quick access to different page sections and to control the availability of information on a page.
Toolbar configuration	You can choose the toolbar elements that appear and arrange them in any sequence. You can also modify the definitions of the delivered toolbar buttons or use application classes to create new buttons.
Personalization by end user	Order Capture users, such as customer service representatives (CSRs), can personalize the toolbar by selecting which buttons appear on it. Personalized configurations are associated with user IDs and do not affect the base toolbar definition. As an administrator, during setup, you decide whether users can personalize toolbars and specify the buttons in the toolbar that these users can hide in the personalization process.

Related Links

"Understanding the Configurable Toolbar" (Automation and Configuration Tools)

Understanding Application Class Set Creation

Order Capture uses the application class registry to store references to processing logic. Existing Order Capture application classes handle processing for the main order and quote classes primarily.

To register, or create, classes, you must enter the full class path into the application class registry. After the system stores this information, you can dynamically instantiate the class through PeopleCode. The registry enables you to create subclasses of the main class and substitute these classes for the main class. Order Capture uses this registry to dynamically invoke the logic that is required for each capture type. PeopleSoft Customer Relationship Management (PeopleSoft CRM) industry-specific applications invoke different logic from Order Capture. You can create and register additional classes without modifying the delivered extensions.

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Common Elements Used in Setting Up Order Capture

Field or Control	*Description*
Clone	Click to clone a workbench page to a different setID.
Next	Click to proceed to the next item in the list.
Previous	Click to return to the previous item in the list.
Workbench	Click to return to the main page.

Setting Up Order Capture Tables

To set up Order Capture tables, use the Capture Setup Tables component.

To set up sub source tables, use the Sub Source component.

To set up sub source mapping tables, use then Sub Source Mapping component

Pages Used to Set Up Order Capture Tables

Page Name	*Definition Name*	*Usage*
Capture Setup Tables Workbench Page	RO_DEFN	Access Order Capture setup tables.
Capture Setup Tables - Charge Frequencies Workbench Page	RO_DEFN_CHGFREQ	Define charge frequencies.
Capture Setup Tables - Charge Types Workbench Page	RO_DEFN_CHGTYPE	Define charge types.
Capture Setup Tables - Data Event Handlers Workbench Page	RO_DEFN_DATAELM	Create data event handlers. Here you define application class references that are dynamically called for the purpose of auditing system and user actions. These references also control the processing for order maintenance.
Capture Setup Tables - Hold Codes Workbench Page	RO_DEFN_HOLD	Define hold codes.

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Page Name	*Definition Name*	*Usage*
Capture Setup Tables - Reason Codes Workbench Page	RO_DEFN_HLD_DEN	Define reason codes.
Capture Setup Tables - Dynamic Events Workbench Page	RO_DEFN_DYEVENT	Create dynamic events. Define application class references that are dynamically called for the purpose of providing plug-and-play processing during component processing.
Capture Setup Tables - Frequency Mappings Workbench Page	RO_DEFN_SCHDMAP	Map recurring price frequency in PeopleSoft CRM to a schedule in PeopleSoft Contracts.
Capture Setup Tables - Header Statuses Workbench Page	RO_DEFN_HDSTAT	Define header statuses that correspond with your business process.
Capture Setup Tables - Line Actions Workbench Page	RO_DEFN_LNACTN	Create line actions.
Capture Setup Tables - Line Status Types Workbench Page	RO_DEFN_LS_TYPE	View or edit engagement service line status types.
Capture Setup Tables - Line Statuses Workbench Page	RO_DEFN_LNSTAT	Create line statuses that correspond with your business processes.
Capture Setup Tables - Line Statuses DropDown Workbench Page	RO_DEFN_LNPRMPT	Control or view the line status values available for your engagement service products.
Capture Setup Tables - MCF Types Workbench Page	RO_DEFN_MCFTYPE	Define MCF types, such as print or email.
Capture Setup Tables - Note Origins Workbench Page	RO_DEFN_NOTORIG	Define note origins.
Capture Setup Tables - Note Types Workbench Page	RO_DEFN_NOTTYPE	Define note types.
Capture Setup Tables - Note Visibility Workbench Page	RO_DEFN_NOTVSBL	Create note visibility.
Capture Setup Tables - Priorities Workbench Page	RO_DEFN_PRIORTY	Define priorities for orders.
Capture Setup Tables - Source Codes Workbench Page	RO_DEFN_SOURCE	Define source codes—such as phone, web, and fax—for inbound capture requests.

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Page Name	*Definition Name*	*Usage*
Capture Setup Tables - Sub Source Codes Workbench Page	RO_DEFN_SUB_SRC	Define sub source codes.
Capture Setup Tables - Sub Source Mapping Workbench Page	RO_DFN_SRC2SSRC	Define mappings between source and sub source codes.

Understanding MCF Types

Order Capture enables communication with customers from within the application. Order Capture can also send communications automatically when an order or quote is submitted or maintained. To do this, you must define correspondence templates and packages in advance. PeopleSoft delivers sample Order Confirmation, Quote Confirmation, and Order Maintenance templates and packages.

Specific Order Capture MCF templates are marked for use with print correspondence, email correspondence, or both. Use these templates to generate email or print notifications from key transactions, such as an order or quote.

Note: Order Capture templates contain both static text and tokens. Tokens represent key data (product ID, price, order ID, and so on) from the Order Capture system.

Order Capture delivers these sample MCF templates for major transactions:

- Order Confirmation.
- Quote Confirmation.
- Order Maintenance.
- Order Status.

  Note: This correspondence package is used only when automatically responding to a structured email that was sent from an external source.

- Order Status Failed.

  Note: This correspondence package is used only when responding to an invalid structured email request.

You can define additional MCF types for Order Capture on the MCF Types (multichannel framework types) page.

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Common Elements Used in Order Capture Table Setup

Field or Control	*Description*
Application Class ID	Enter the PeopleTools application class ID that is stored in the PSAPPCLASSDEFN table.
Package Tree Viewer	Click to access the Application Packages Lookup page and select an application class. The system populates the **Application Class ID** and **Application Class Path** fields according to the class that you select. **Note:** This is the highest-level package that contains this class. You can retrieve values through the Application Package Designer.

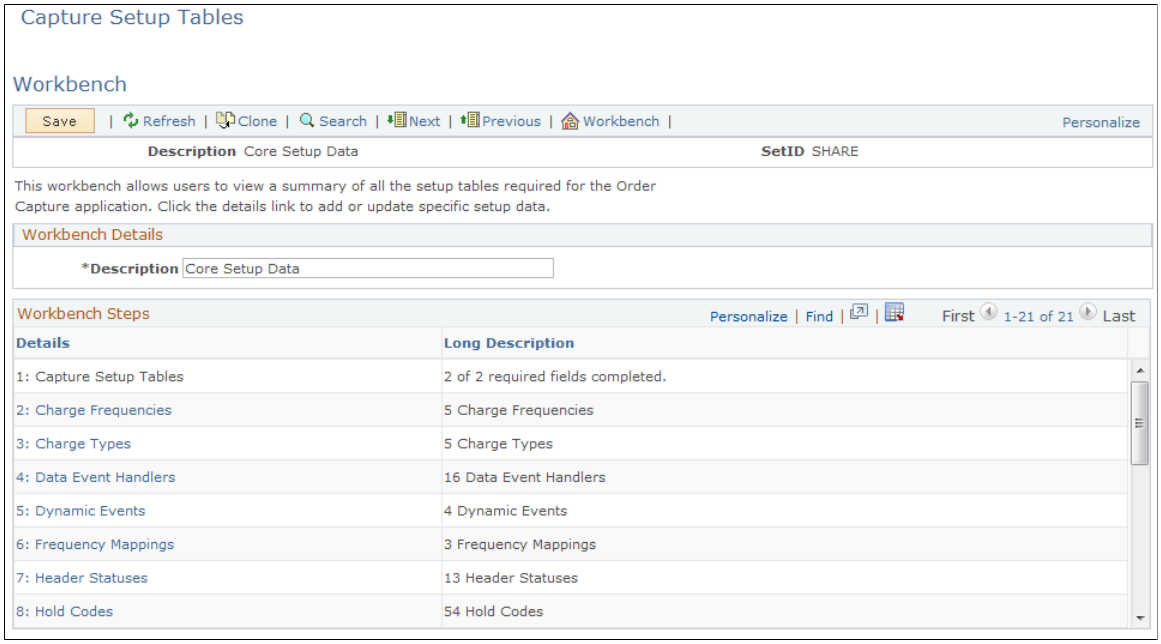
Capture Setup Tables Workbench Page

Use the Capture Setup Tables Workbench page (RO_DEFN) to access Order Capture setup tables.

Navigation:

Set Up CRM > **Product Related** > **Order Capture** > **Setup Workbench** > **Capture Setup Tables Workbench**

This example illustrates the fields and controls on the Capture Setup Tables Workbench page.



Field or Control	*Description*
Details	Click the link in the **Details** column to view, create, or modify values for each Order Capture setup table.

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Field or Control	*Description*
Progress	In the **Progress** column, the system displays the number of rows of data defined for each of the steps listed in the details column.

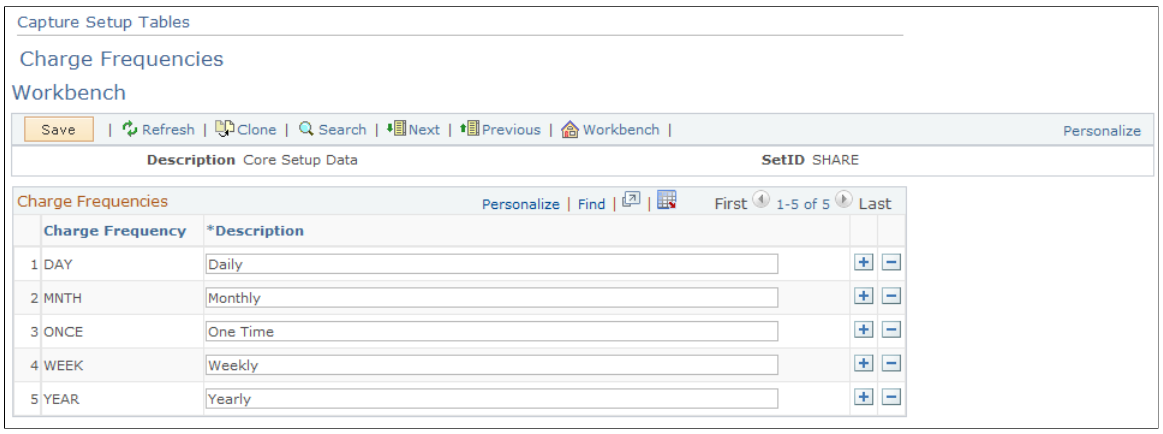
Capture Setup Tables - Charge Frequencies Workbench Page

Use the Capture Setup Tables - Charge Frequencies Workbench page (RO_DEFN_CHGFREQ) to define charge frequencies.

Navigation:

Click the **Charge Frequencies** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Charge Frequencies Workbench page.



Charge frequencies are defined per product, and they represent the frequency of a recurring charge. In Order Capture, these frequencies appear on the order entry form in the Totals section.

Note: If you define a recurring price and charge frequency for a product in a price list or in the product model, then that frequency and recurring price also appear in the Totals section of the order entry form.

Field or Control	*Description*
Charge Frequency	Displays the code for the frequency of the recurring charge.
Description	Displays the description of the recurring charge's frequency. This field is visible to the end user.

Related Links

Order - Entry Form Page or Quote - Entry Form Page

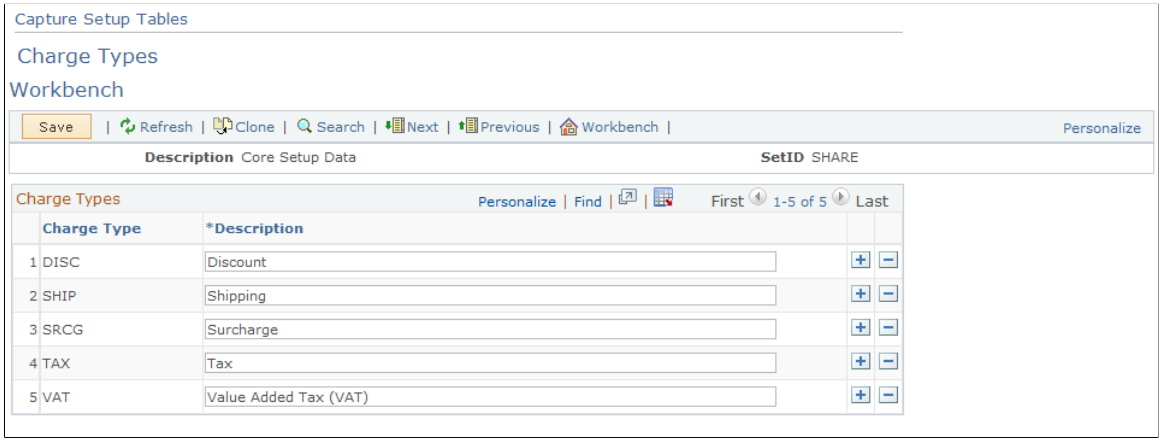
Capture Setup Tables - Charge Types Workbench Page

Use the Capture Setup Tables - Charge Types Workbench page (RO_DEFN_CHGTYPE) to define charge types.

Navigation:

Click the **Charge Types** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Charge Types Workbench page.



In Order Capture, charge types appear in the Totals section of the order entry form. Charge types are additional charges or discounts (such as shipping and taxes) that are applied to the order.

Field or Control	*Description*
Charge Type	Displays the system code for the charge type.
Description	Displays the description of the charge type. This field is visible to the user.

Capture Setup Tables - Data Event Handlers Workbench Page

Use the Capture Setup Tables - Data Event Handlers Workbench page (RO_DEFN_DATAELM) to create data event handlers.

Here you define application class references that are dynamically called for the purpose of auditing system and user actions. These references also control the processing for order maintenance.

Navigation:

Click the **Data Event Handlers** link on the Capture Setup Tables Workbench page.

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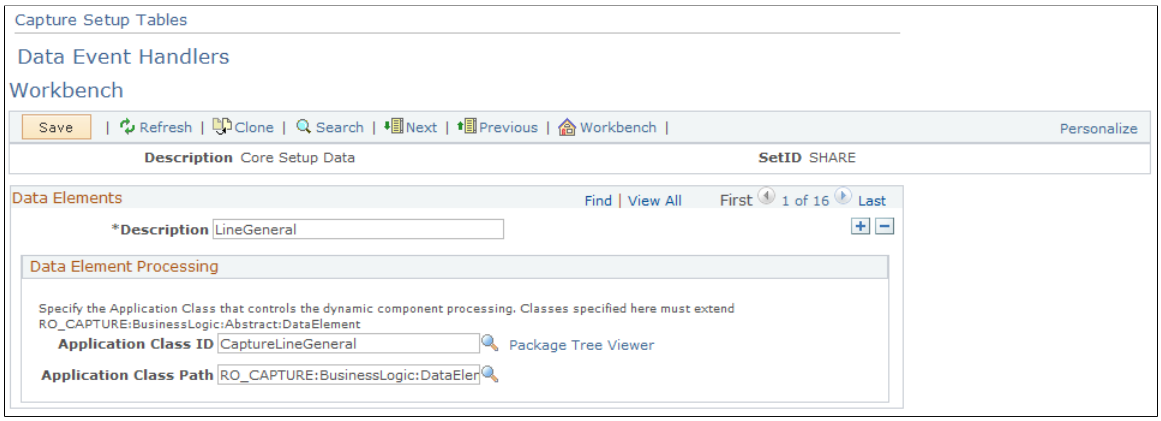
This example illustrates the fields and controls on the Capture Setup Tables - Data Event Handlers Workbench page.



Related Links

"Understanding Application Classes and Packages" (Automation and Configuration Tools)

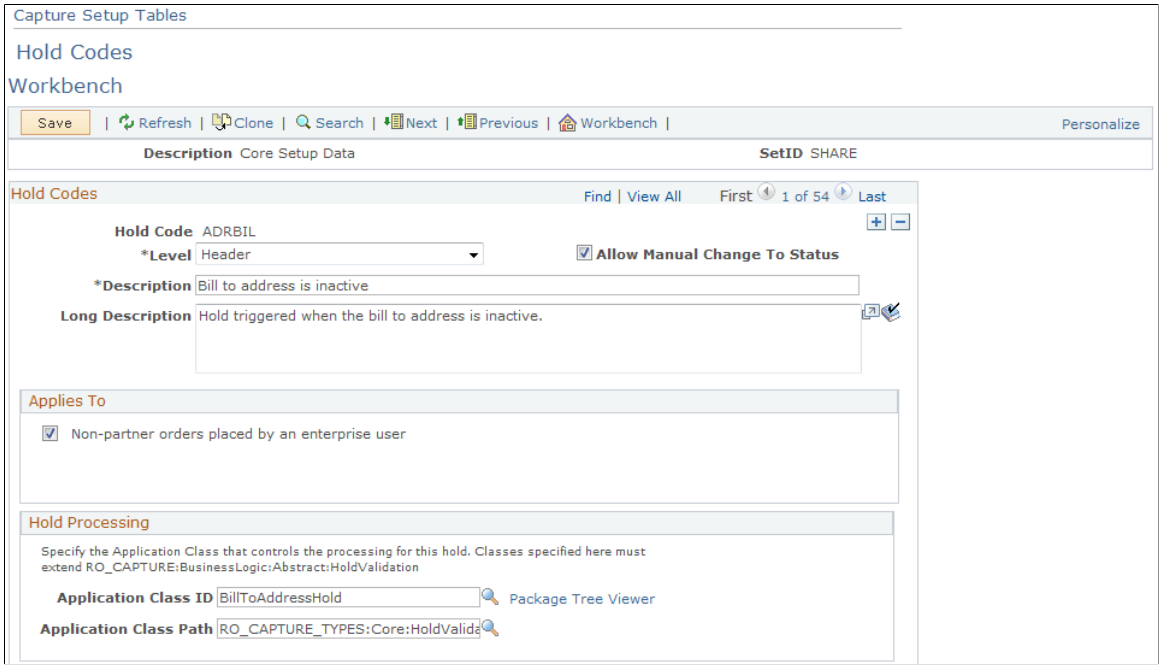
Capture Setup Tables - Hold Codes Workbench Page

Use the Capture Setup Tables - Hold Codes Workbench page (RO_DEFN_HOLD) to define hold codes.

Navigation:

Click the **Hold Codes** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Hold Codes Workbench page.



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Set up hold codes to create hold logic that executes when you submit a specific capture type for processing. These codes are created as extensions of a base hold validation class so that they are dynamically created and carried out. You can add configurable hold logic here without additional system configuration.

Add a new class in the RO_CAPTURE_TYPES application package for each hold code that you add. The new class performs the hold validation.

Hold Codes

Field or Control	*Description*
Hold Code	Displays a unique code identifier.
Level	Select the level of the capture data for which this hold is triggered. This determines the type of data that is passed to the hold check. If you select *Header,* the system evaluates header-level holds once per capture. If you select *Line,* the system evaluates line-level holds once per capture line.
Allow Manual Change To Status	Select to enable a user to manually change the status of (or remove) this hold when it is triggered. If the hold is absolutely required in this condition, clear this check box. For example, if a billing customer is not specified on an order, a CSR is not permitted to simply remove this hold; the CSR should perform a corrective action to remove the hold. In this example, the CSR must return to the order and specify a bill-to customer.

Applies To

Select *Non-partner orders placed by an enterprise user* if you want to apply the defined holds to simple orders placed by enterprise users (for example, CSR)

Related Links

"Understanding Application Classes and Packages" (Automation and Configuration Tools)

Capture Setup Tables - Reason Codes Workbench Page

Use the Capture Setup Tables - Reason Codes Workbench page (RO_DEFN_HLD_DEN) to define reason codes.

Navigation:

Click the **Reason Codes** link on the Capture Setup Tables Workbench page.

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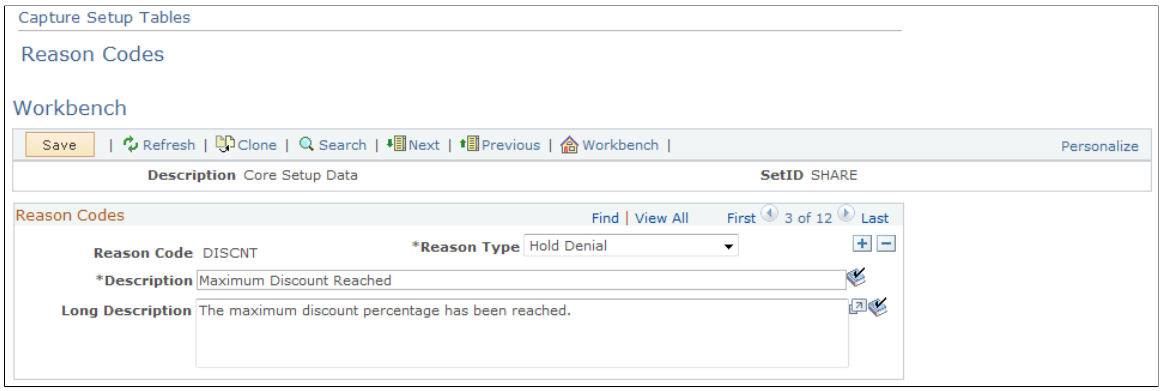
This example illustrates the fields and controls on the Capture Setup Tables - Reason Codes Workbench page.



An enterprise can set up reason codes for specific actions that might occur. For example, when a hold is overridden, you should record a reason for the action.

Field or Control	***Description***
Reason Type	Select the type of action to which the reason code applies. Available values include, but not limited to: • *Hold Denial* The reason for rejecting holds on orders. Hold Denial reason codes are available during order entry. • *Hold Override* The reason the hold was overridden. Hold Override reason codes appear in order entry when a hold is overridden.

See “Understanding PeopleSoft CRM Security” (Application Fundamentals).

Capture Setup Tables - Dynamic Events Workbench Page

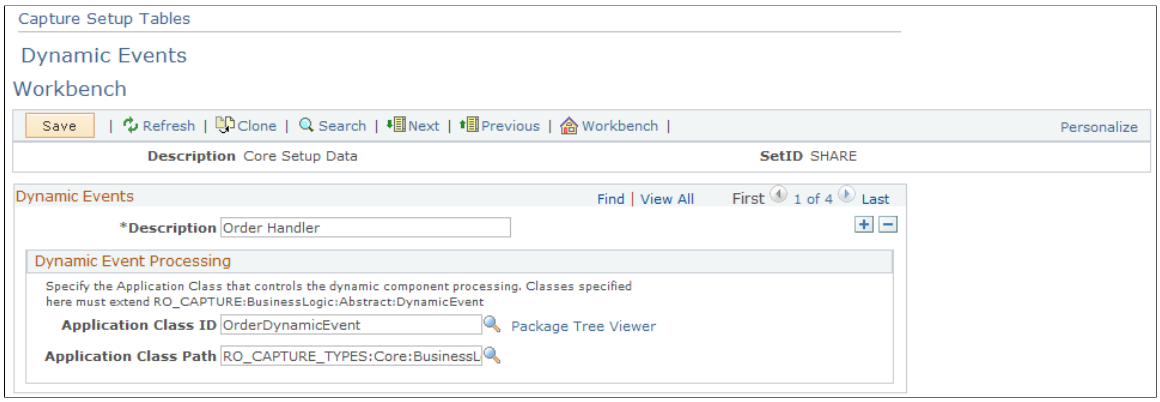
Use the Capture Setup Tables - Dynamic Events Workbench page (RO_DEFN_DYEVENT) to create dynamic events.

Define application class references that are dynamically called for the purpose of providing plug-and-play processing during component processing.

Navigation:

Click the **Dynamic Events** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Dynamic Events Workbench page.



Dynamic events are application classes that are loaded during the component lifecycle. When you load the component, enter data, and save, the system loads these events and, based upon methods in these classes, carries out certain logic.

Note: You can use these classes to plug in new logic without configuring the existing application.

Related Links

"Understanding Application Classes and Packages" (Automation and Configuration Tools)

Capture Setup Tables - Header Statuses Workbench Page

Use the Capture Setup Tables - Header Statuses Workbench page (RO_DEFN_HDSTAT) to define header statuses that correspond with your business process.

Navigation:

Click the **Header Statuses** link on the Capture Setup Tables Workbench page.

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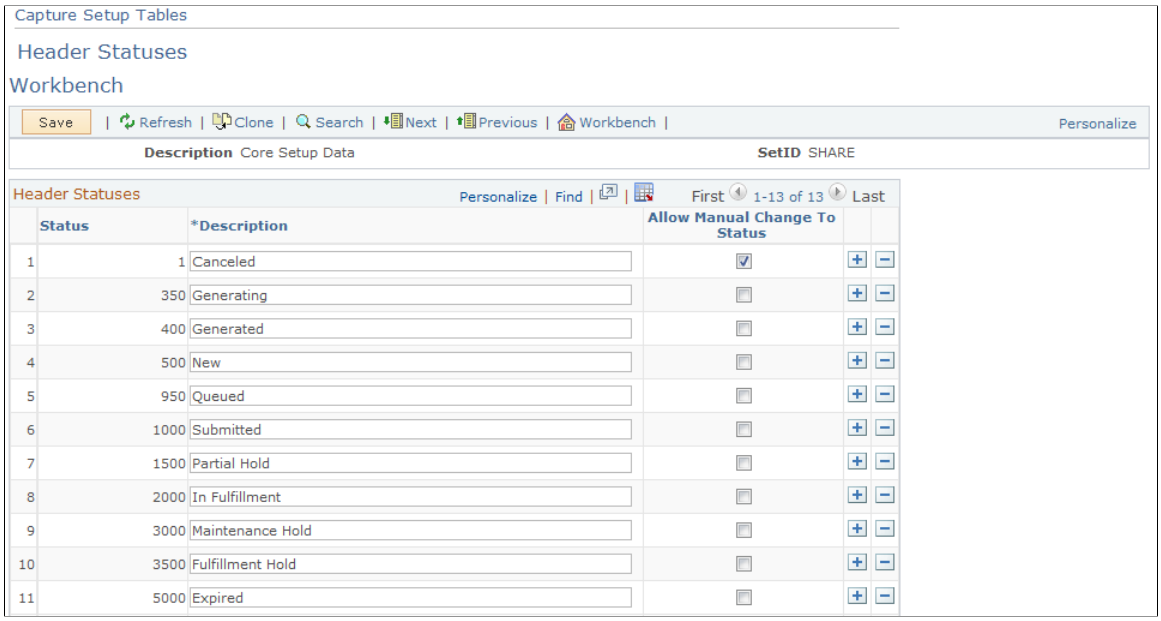
This example illustrates the fields and controls on the Capture Setup Tables - Header Statuses Workbench page.



Field or Control	*Description*
Status	Displays the status code identifier for the header status.
Description	Displays the description of the header status. This description is visible to CSRs and self-service users.
Allow Manual Change To Status	Select to enable the CSR to make a manual change to this status during order entry.

Note: Since a quote has an expiration date, a batch job examines the quote expiration dates and assigns any expired quotes a new header status of *Expired,* or whatever you choose to call it here. This action also triggers an integration point to update any associated proposals in the PeopleSoft Proposal Management system to *Canceled.* The exception to this rule is, that if any other quote that is not expired has a reference to the same proposal ID, it is not cancelled in PeopleSoft Proposal Management. If an *Expired* quote is revised, the line status for the engagement status is reset to *Draft* and an integration point is automatically sent to PeopleSoft Proposal Management.

Capture Setup Tables - Line Actions Workbench Page

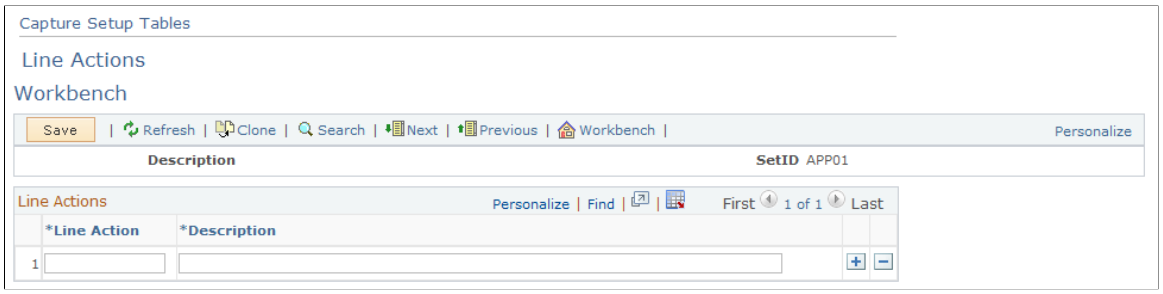
Use the Capture Setup Tables - Line Actions Workbench page (RO_DEFN_LNACTN) to create line actions.

Capture type lines use these actions.

Navigation:

Click the **Line Actions** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Line Actions Workbench page.



This page is not used by Order Capture.

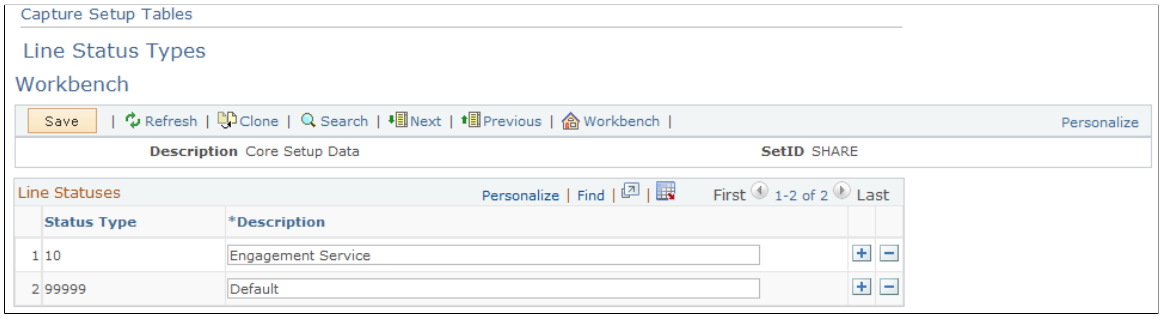
Capture Setup Tables - Line Status Types Workbench Page

Use the Capture Setup Tables - Line Status Types Workbench page (RO_DEFN_LS_TYPE) to view or edit engagement service line status types.

Navigation:

Click the **Line Status Types** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Line Status Types Workbench page.



Line Statuses

When entering quotes, the options for the quote lines depend on the line status. This page defines those status types. The *Engagement Service* line status type is used for engagement services products, and the *Default* line status type is used for any product that is not flagged as an engagement service product.

Capture Setup Tables - Line Statuses Workbench Page

Use the Capture Setup Tables - Line Statuses Workbench page (RO_DEFN_LNSTAT) to create line statuses that correspond with your business processes.

Navigation:

Click the **Line Statuses** link on the Capture Setup Tables Workbench page.

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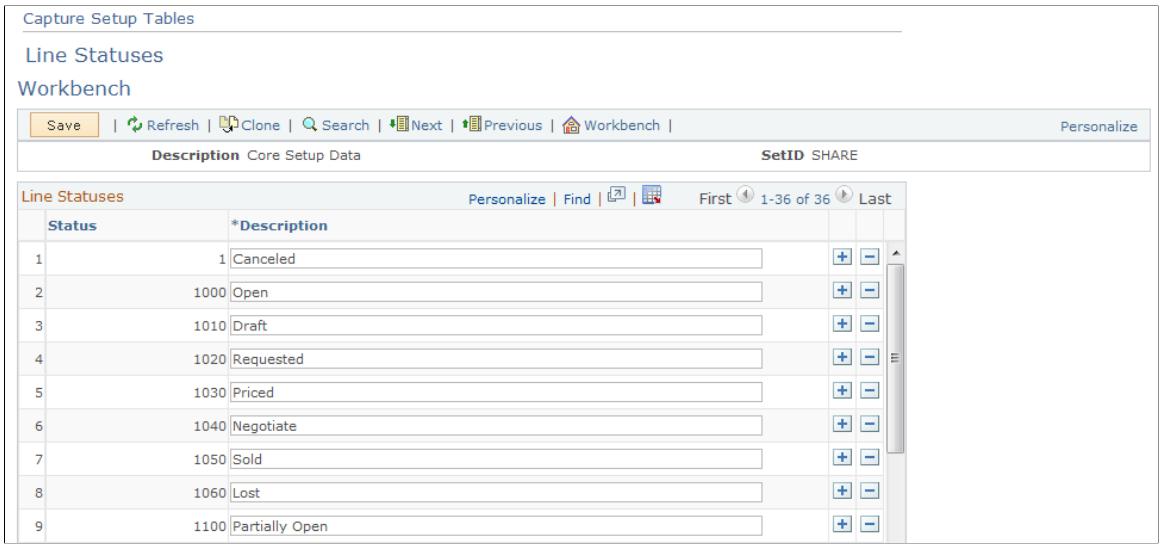
This example illustrates the fields and controls on the Capture Setup Tables - Line Statuses Workbench page.



Line Statuses

Field or Control	*Description*
Status	Displays the unique numeric code identifier for the line status.
Description	Displays the description for the line status. This description is visible to the CSR.

Note: There are six line statuses specifically designed for engagement services. These line statuses appear on the Entry Form page, and they map to corresponding statuses in PeopleSoft Proposal Management. You can edit the names of these statuses on this page.

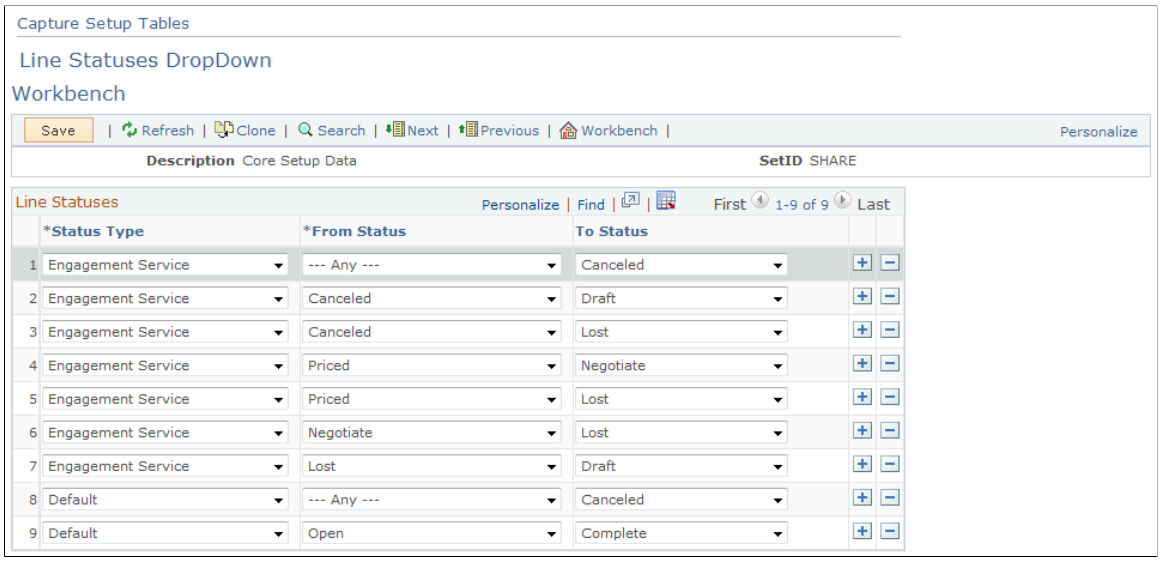
Capture Setup Tables - Line Statuses DropDown Workbench Page

Use the Capture Setup Tables - Line Statuses DropDown Workbench page (RO_DEFN_LNPRMPT) to control or view the line status values available for your engagement service products.

Navigation:

Click the **Line Status DropDown** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Line Statuses DropDown Workbench page.



The status types that you define on the Line Statuses page determines what appears on this page. Since PeopleSoft delivers *Engagement Service* and *Default*, you can specify alternative status values for each of these two types.

Order Capture uses data defined on this page to create the line status options on orders and uses the current line status to determine which statuses are available for selection.

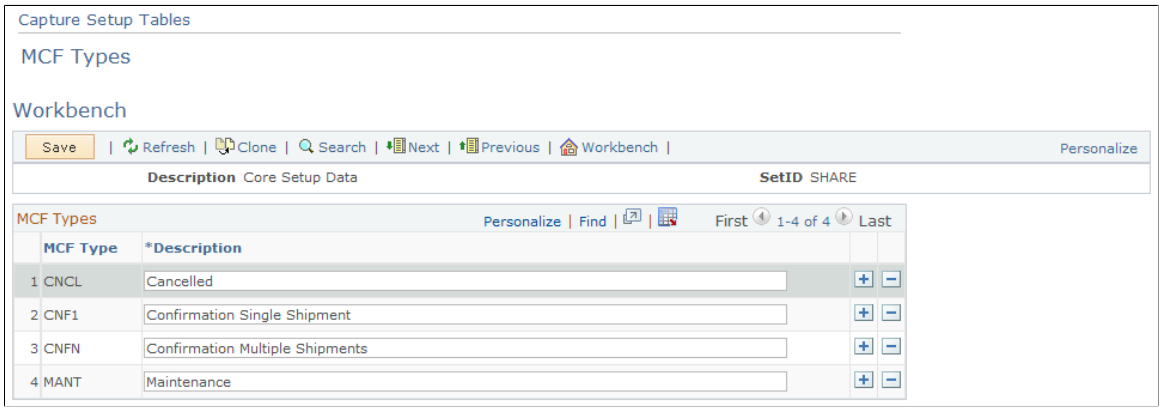
Capture Setup Tables - MCF Types Workbench Page

Use the Capture Setup Tables - MCF Types Workbench page (RO_DEFN_MCFTYPE) to define MCF types, such as print or email.

Navigation:

Click the **MCF Types** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - MCF Types Workbench page.



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Field or Control	*Description*
MCF Type	Displays a unique identifier for the MCF type of correspondence.

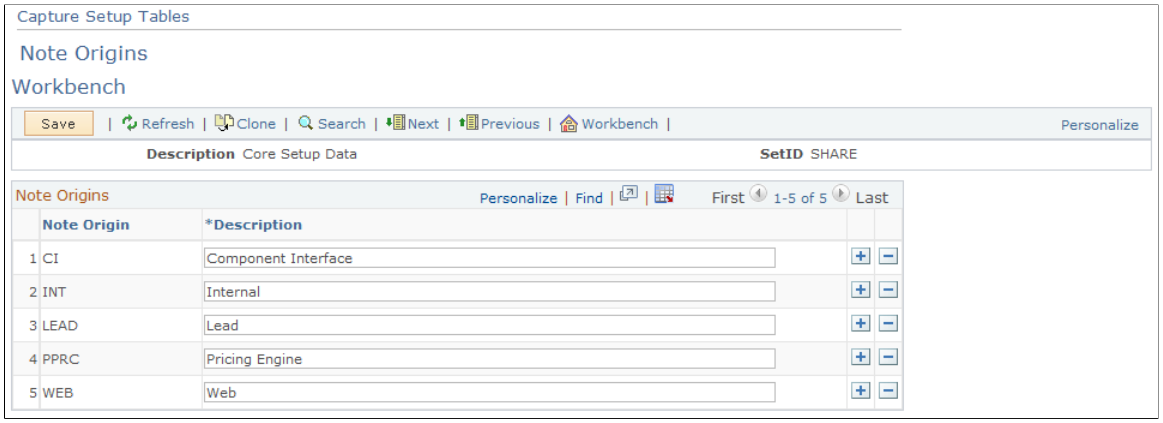
Capture Setup Tables - Note Origins Workbench Page

Use the Capture Setup Tables - Note Origins Workbench page (RO_DEFN_NOTORIG) to define note origins.

Navigation:

Click the **Note Origins** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Note Origins Workbench page.



Note origins (descriptions) appear on the **Notes** tab of the order entry form. This note origin (description) is display-only and indicates the source of the note, such as *Internal* or *Web.*

Field or Control	*Description*
Note Origin	Displays the system code identifier for the note origin.
Description	Displays the description for the note origin. This description is visible to the CSR.

Related Links

"Understanding Notes and Attachments" (Application Fundamentals)

Adding and Viewing Notes and Attachments

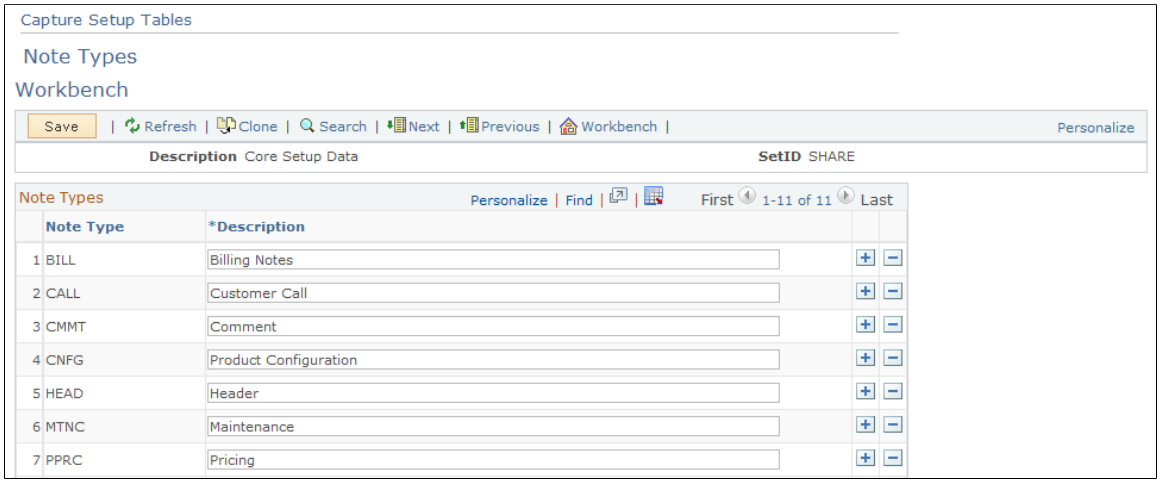
Capture Setup Tables - Note Types Workbench Page

Use the Capture Setup Tables - Note Types Workbench page (RO_DEFN_NOTTYPE) to define note types.

Navigation:

Click the **Note Types** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Note Types Workbench page.



Note types appear in the Note Types drop-down list box on the Notes tab of the order entry form.

Field or Control	*Description*
Note Type	Displays the system code identifier for the note type.
Description	Displays the description for the note type. This description is visible to the CSR.

Related Links

"Understanding Notes and Attachments" (Application Fundamentals)

Adding and Viewing Notes and Attachments

Capture Setup Tables - Note Visibility Workbench Page

Use the Capture Setup Tables - Note Visibility Workbench page (RO_DEFN_NOTVSBL) to create note visibility.

Navigation:

Click the **Note Visibility** link on the Capture Setup Tables Workbench page.

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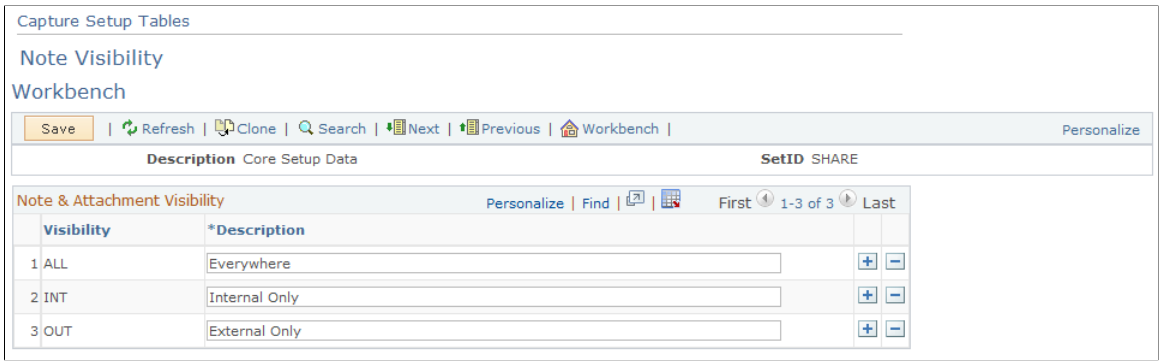
This example illustrates the fields and controls on the Capture Setup Tables - Note Visibility Workbench page.



Note visibility appears in the Visibility field of the Notes tab of the order entry form. It controls who can see the note, and it applies equally to notes and attachments. A note can be visible internally to CSRs or externally to Order Capture Self Service users. For example, if the CSR sets the visibility of a note to *Internal Only,* the self-service user cannot see the note. For attachments, a separate drop-down list box appears when an attachment is added to the order. This field contains the same visibility descriptions.

Field or Control	***Description***
Visibility	Displays the system code identifier for note and attachment visibility.
Description	Displays the description for note and attachment visibility. This description is visible to the CSR.

Related Links

"Understanding Notes and Attachments" (Application Fundamentals)

Adding and Viewing Notes and Attachments

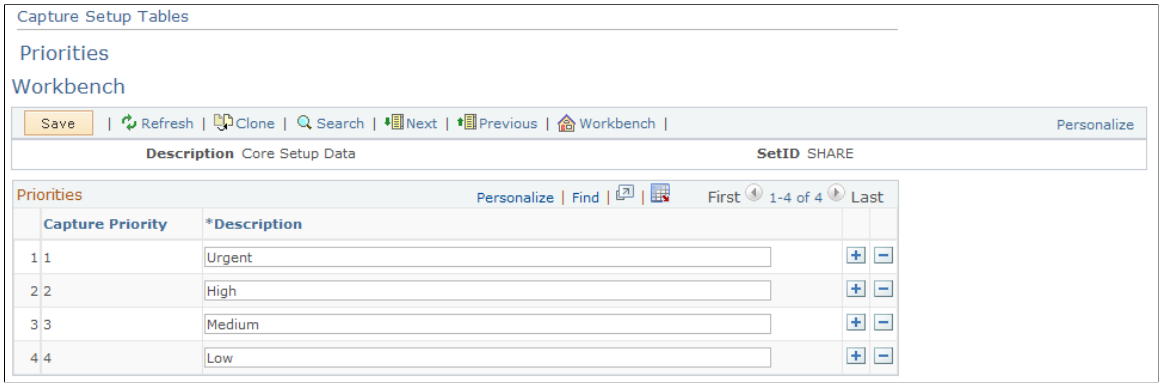
Capture Setup Tables - Priorities Workbench Page

Use the Capture Setup Tables - Priorities Workbench page (RO_DEFN_PRIORTY) to define priorities for orders.

Navigation:

Click the **Priorities** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Priorities Workbench page.



Priority descriptions appear in the header details of the entry form for Order Capture. They contain no processing logic; they are for informational purposes only.

Third-party fulfillment systems can use priorities to determine processing order.

Field or Control	*Description*
Capture Priority	Displays the system code identifier for the capture priority.
Description	Displays the description of the capture priority. This description is visible to the CSR.

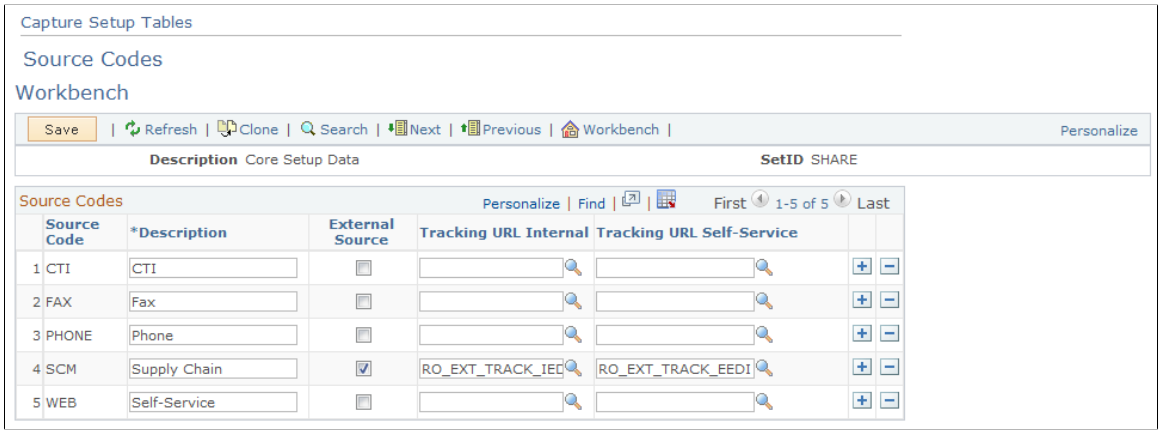
Capture Setup Tables - Source Codes Workbench Page

Use the Capture Setup Tables - Source Codes Workbench page (RO_DEFN_SOURCE) to define source codes—such as phone, web, and fax—for inbound capture requests.

Navigation:

Click the **Source Codes** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Source Codes Workbench page.



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Source codes indicate the origin of an order or quote, and their descriptions appear in a drop-down list box in the header details of the entry form.

Field or Control	*Description*
External Source	Select if the order originated from an external system source. For example, you may have another system that generates orders. This option enables you to migrate these orders into Order Capture so that you can view all of the orders for a particular customer through a single application.
Tracking URL Internal (tracking uniform resource locator internal)	Enter a uniform resource locator (URL) for Order Capture to view a summary of the externally created orders. When CSRs search for orders or quotes and click one of these externally sourced orders, they are transferred to this URL to view the orders.
Tracking URL Self-Service (tracking uniform resource locator self-service)	Enter a URL for Order Capture Self Service to view a summary of the externally created orders. When users search for orders or quotes in Order Capture Self Service, they are transferred to this URL to view the orders.

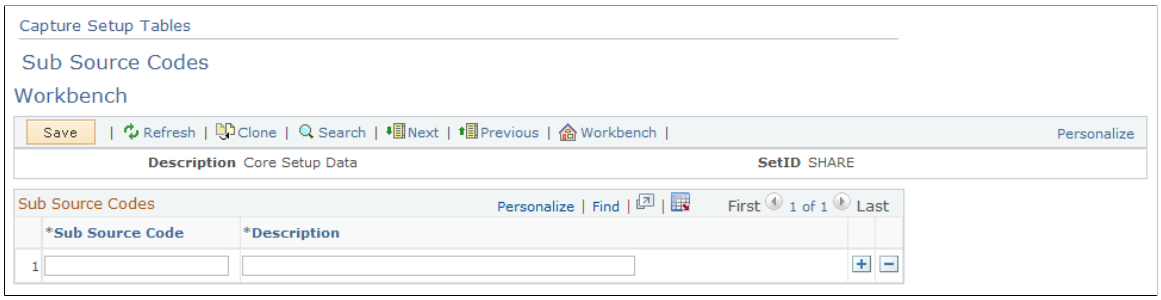
Capture Setup Tables - Sub Source Codes Workbench Page

Use the Capture Setup Tables - Sub Source Codes Workbench page (RO_DEFN_SUB_SRC) to define sub source codes.

Navigation:

Click the **Sub Source Codes** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Sub Source Codes Workbench page.



Use this page to define sub source codes that provide further classification of source codes.

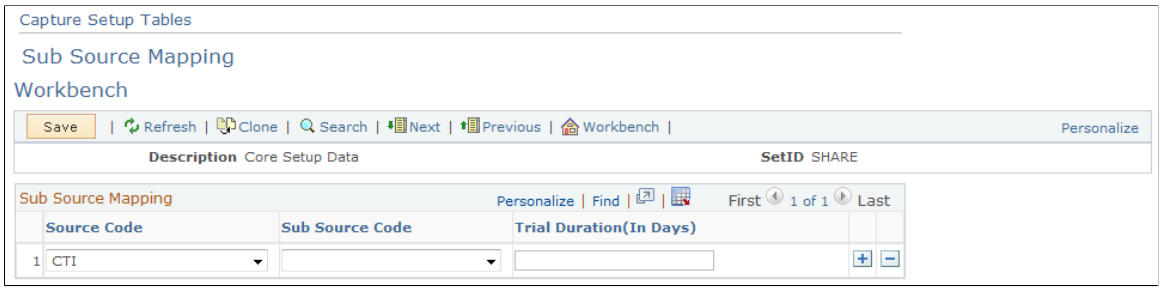
Capture Setup Tables - Sub Source Mapping Workbench Page

Use the Capture Setup Tables - Sub Source Mapping Workbench page (RO_DFN_SRC2SSRC) to define mappings between source and sub source codes.

Navigation:

Click the **Sub Source Mapping** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Sub Source Mapping Workbench page.



Field or Control	*Description*
Sub Source Code	Select a sub source code to associate with the source code. At runtime, when you select a source in an order or quote, the system populates the **Sub Source** field with values that are mapped to the selected source code on this page.
Trial Duration (In Days)	Enter the minimum length (in number of days) of trial periods that is allowed in your country for selling products through the specified source and sub-source combination.

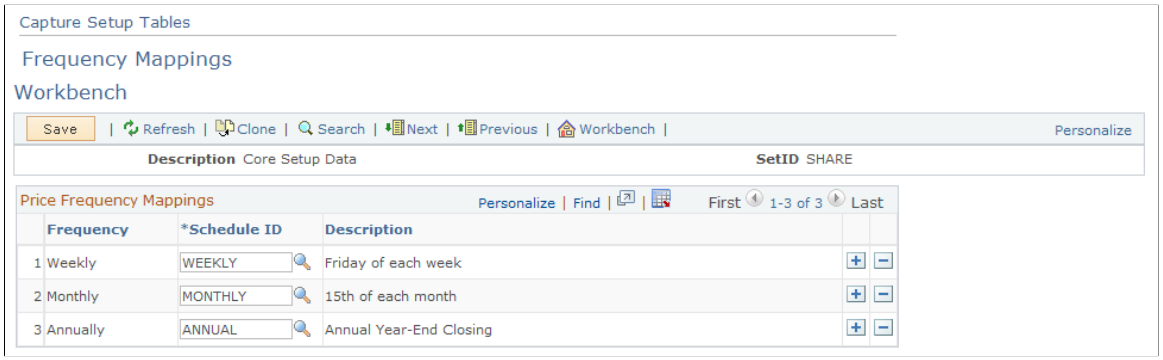
Capture Setup Tables - Frequency Mappings Workbench Page

Use the Capture Setup Tables - Frequency Mappings Workbench page (RO_DEFN_SCHDMAP) to map recurring price frequency in PeopleSoft CRM to a schedule in PeopleSoft Contracts.

Navigation:

Click the **Frequency Mappings** link on the Capture Setup Tables Workbench page.

This example illustrates the fields and controls on the Capture Setup Tables - Frequency Mappings Workbench page.



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Price Frequency Mappings

Field or Control	*Description*
Frequency	Select the relevant PeopleSoft CRM pricing frequency for the schedule that you defined in PeopleSoft Contracts.
Schedule ID	Enter the Schedule ID for purposes of the integration with PeopleSoft Contracts. Schedule ID determines how many billing transactions will be created. PeopleSoft Contracts only supports weekly, monthly, or annual schedule types. **Note:** Schedule ID is synchronized from PeopleSoft Financials Management to CRM. It determines the number of billing transactions that are created in PeopleSoft Billing.

See Also

PeopleSoft Financials, ESA, ALM, and SCM Portal Packs

Related Links

"Understanding PeopleSoft CRM Integration with the Transaction Billing Processor" (PeopleSoft Services Foundation)

Defining Order and Quote Processing

To create type definitions, use the Type Definition (RO_TYPE) component.

Note: In this workbench, you apply data from the Setup Workbench to a specific capture type.

Pages Used to Define Order and Quote Processing

Page Name	*Definition Name*	*Usage*
Type Definition Workbench Page	RO_TYPE	Create type definitions for the Order, Quote, and Order Copy capture types.
Type Definition - Hold Processing Workbench Page	RO_TYPE_HOLD	Define hold processing for the capture type.
Type Definition - Business Process Conditions Workbench Page	RO_TYPE_BPEVENT	Define business process conditions that fire for the capture type.

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Page Name	*Definition Name*	*Usage*
Type Definition - Audit Conditions Workbench Page	RO_TYPE_ADEVENT	Define audit events for the capture type.
Type Definition - Maintenance Conditions Workbench Page	RO_TYPE_DEEVENT	Define maintenance conditions by defining the data element events for the capture type. Data elements and their associated classes drive the maintenance and audit processing for the capture type.
Type Definition - Dynamic Events Workbench Page	RO_TYPE_DYEVENT	Define dynamic events for this capture type. Dynamic events allow for dynamic, pluggable processing for a capture type, using dynamic event classes.
Type Definition - MCF Types Workbench Page	RO_TYPE_MCFTYPE	Define MCF types that this capture type uses.
Type Definition - Process Types Workbench Page	RO_TYPE_PROCTYP	Define process types for a capture type.
Build Condition Page	RO_TYPE_PHRASE	Search for and select the events that trigger business process, audits, or maintenance workflow.

Type Definition Workbench Page

Use the Type Definition Workbench page (RO_TYPE) to create type definitions for the Order, Quote, and Order Copy capture types.

Navigation:

Set Up CRM > **Product Related** > **Order Capture** > **Capture Type Workbench** > **Type Definition**

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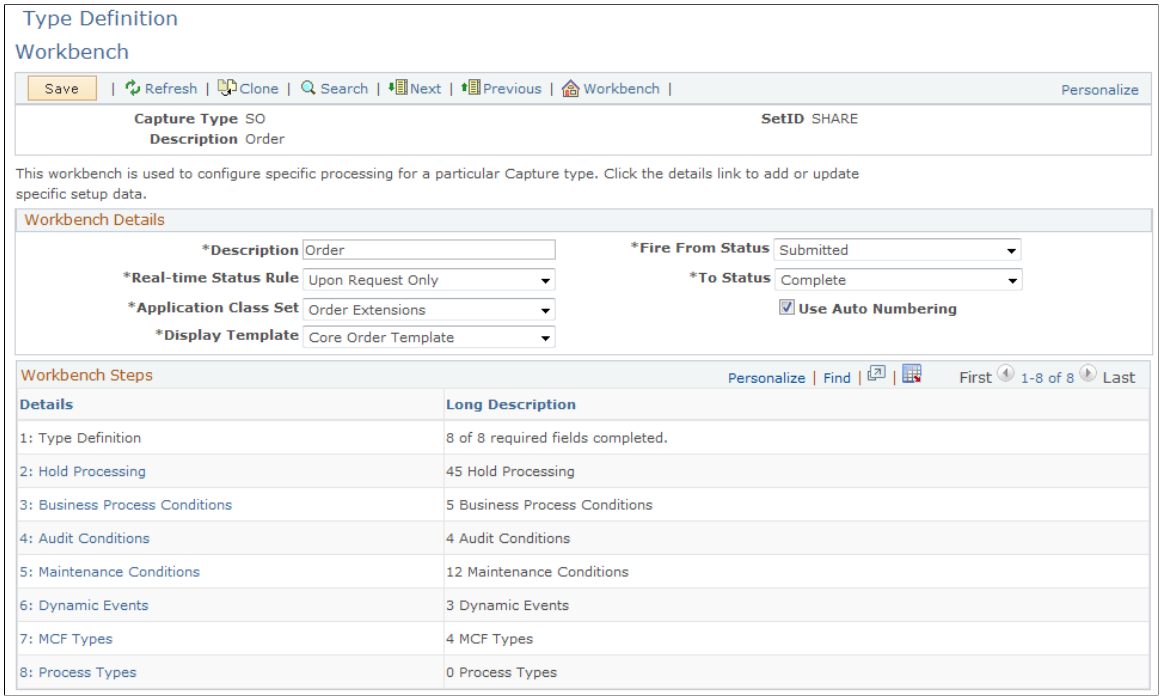
This example illustrates the fields and controls on the Type Definition Workbench page.



Type Definition is the main workbench page for creating type definitions for the Order, Quote, and Order Copy capture types.

Workbench Details

Field or Control	*Description*
Description	Displays the description of the capture type. This appears during capture entry.
Real-Time Status Rule	Select when to invoke the real-time status integration point . Values are: *Upon Request Only:* Invokes the integration point when the CSR clicks Refresh on the toolbar. *Prior to Capture Status Only:* Invokes the integration point when the user searches and selects a capture. *Capture Status and On Request:* Invokes the integration point when the user clicks Refresh and when the user searches and selects a capture. *Do Not Fire.*

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Field or Control	*Description*
Fire From Status	Select the status at which the processing occurs, such as *Open* or *In Process.* Statuses are identified by numeric status codes in the system. The selection here should represent the lowest numeric status code, which is the point at which the real-time status integration point fires.
Application Class Set	Select application class set extensions that the system created during the application class registry setup step. *Order Extensions* is the default class set for orders; *Quote Extensions* is the default class set for quotes.
To Status	Select the status at which the processing occurs, such as *Open* or *In Process.* Statuses are identified by numeric status codes in the system. The selection here should represent the highest numeric status code, which is the point at which the real-time status integration point fires.
Use Auto Numbering	Select to enable autonumbering schemas, which the system chooses based on capture type and setID. If the system does not use these schemas, then the CAPTURE_ID is generated using the PeopleTools `UIDGen()` built-in function. See “Setting Up Automatic Numbering” (Application Fundamentals).

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Field or Control	*Description*
Display Template	Control the user interface of the runtime component (RO_CAPTURE) by selecting a display template. Before you can make a selection here, you must create a display template or modify an existing template. You can define a new display template for Order Capture by navigating to Set Up CRM, Common Definitions, Component Configuration, Display Template Definition. You can modify an existing template by navigating to Set Up CRM, Common Definitions, Component Configuration, Display Template Details. **Note:** Display templates allow for extensive configurability. For example, you can choose to divide the order entry form into sections and you can control the visibility of these sections (as well as the fields within the sections) from the display template. We deliver two display templates for Order Capture. These are CORE_ORDER (Order Template) and CORE_QUOTE (Display template for Quote). Since several industry-specific applications rely upon Order Capture, other display templates are also made available and those templates contain fields most relevant to that particular sector.

Workbench Steps

Field or Control	*Description*
Details	Click a link in this column to view, create, or modify specific configurations for business processing logic.
Progress	Displays the number of steps completed from those that are available.

Type Definition - Hold Processing Workbench Page

Use the Type Definition - Hold Processing Workbench page (RO_TYPE_HOLD) to define hold processing for the capture type.

Navigation:

Click the **Hold Processing** link on the Type Definition Workbench page.

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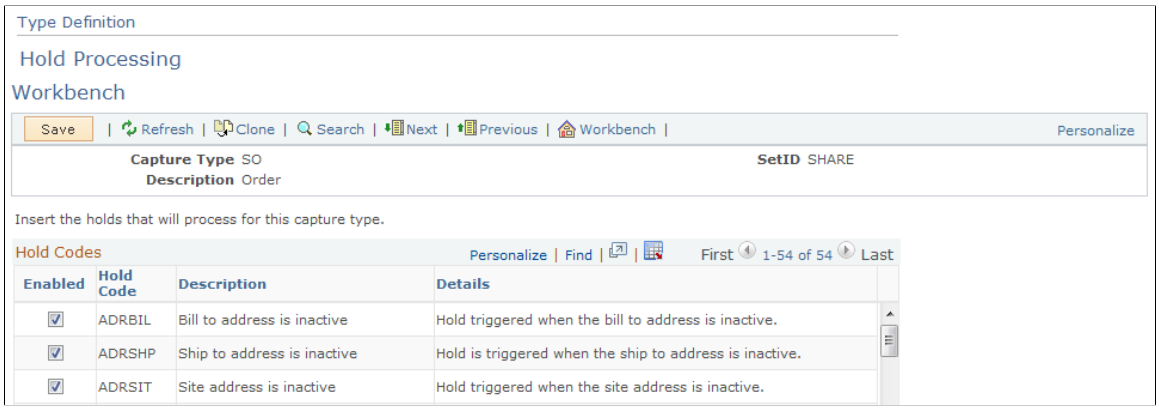
This example illustrates the fields and controls on the Type Definition - Hold Processing Workbench page.



After you define holds in the Setup Workbench, you must enable or disable them for every capture type. Hold conditions appear on the Holds tab of the entry form after submission.

Field or Control	*Description*
Enabled	Select to make the corresponding hold code active or inactive for the current capture type.

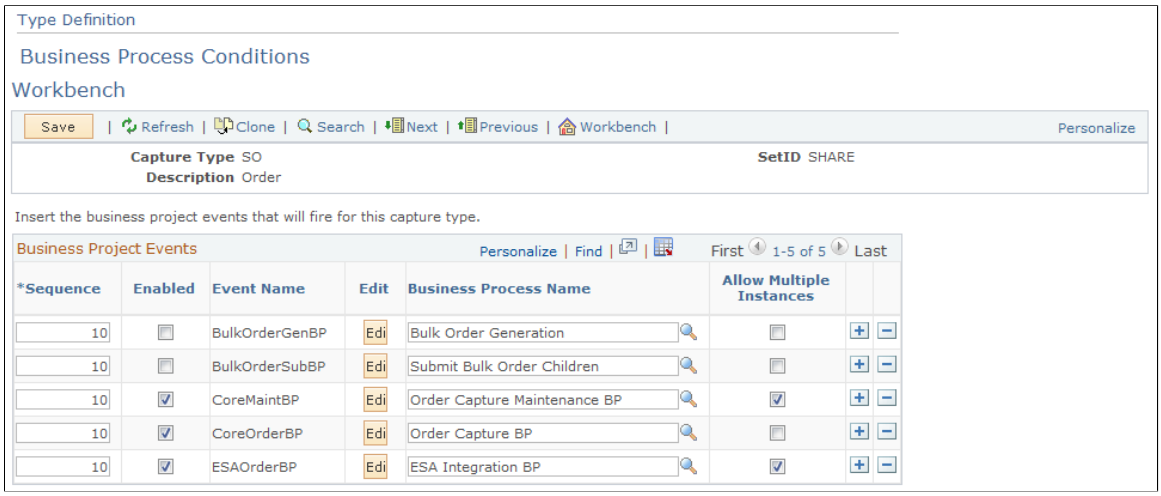
Type Definition - Business Process Conditions Workbench Page

Use the Type Definition - Business Process Conditions Workbench page (RO_TYPE_BPEVENT) to define business process conditions that fire for the capture type.

Navigation:

Click the **Business Process Conditions** link on the Type Definition Workbench page.

This example illustrates the fields and controls on the Type Definition - Business Process Conditions Workbench page.



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When you submit an order or quote, business processes fire immediately or are queued for future-dated orders and quotes. You can view the type of business process condition that is used on the Related actions tab of the order entry form.

Define business process conditions for each capture type here, and include events for order submission as well as order maintenance activity.

Business Project Events

Field or Control	*Description*
Sequence	Enter the order in which the Order Capture business process condition fires when more than one event fires for a single capture.
Enabled	Select to activate the corresponding event.
Event Name	Displays the event name for the business process you select in the **Business Process Name** field. The exact Event Name must be entered for the corresponding Business Process Name. If you use an unrecognized event name, the default is to run the business process associated to the event. The field becomes read-only after you save the page.
Edit	(Optional) Click to launch the Build Process Conditions page, where you can override the delivered PeopleCode logic for initiating the process using the terms of the Active Analytics Framework (AAF). For example, if the current PeopleCode condition fires the event when RO_HEADER.STATUS_CODE >= 2000, you can override it by defining a different condition that fires the event, for example, RO_HEADER.STATUS_CODE >= 1000. When an AAF condition is defined, the PeopleCode condition is ignored.
Business Process Name	Select an order capture business process to be initiated when the process conditions are met. Order Capture delivers three business processes representing the order, the quote, and order change/maintenance.
Allow Multiple Instances	Select to enable multiple instances of this business process to start and run against the same capture.

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Related Links

"Understanding AAF" (Automation and Configuration Tools)

Understanding Order Capture Business Projects

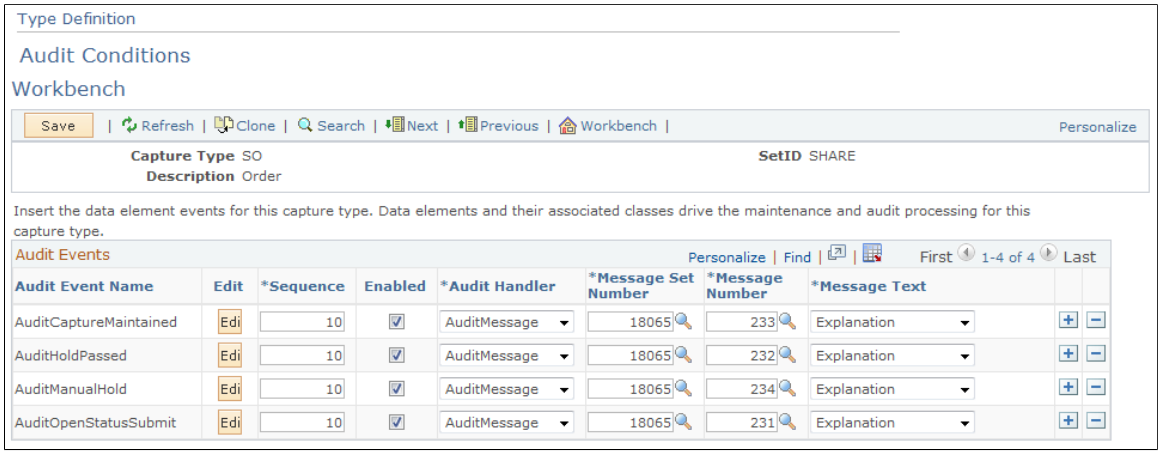
Type Definition - Audit Conditions Workbench Page

Use the Type Definition - Audit Conditions Workbench page (RO_TYPE_ADEVENT) to define audit events for the capture type.

Navigation:

Click the **Audit Conditions** link on the Type Definition Workbench page.

This example illustrates the fields and controls on the Type Definition - Audit Conditions Workbench page.



Audit events appear in Change History on the History tab of the order entry form. Audits help identify the specific events that took place relative to this specific order or quote.

Note: If audit conditions are not defined on this page, hard-coded conditions are used.

Audit Events

Field or Control	*Description*
Audit Event Name	Displays a reference to the AAF term.
Edit	(Optional) Click to launch the Build Condition page, where you can create condition statements using AAF terms to determine when the audit event is fired.
Sequence	Enter the sequence in which the audit events fire. Events can fire simultaneously.

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Field or Control	*Description*
Enabled	Select to enable the corresponding audit event.
Audit Handler	Select the data element from the Setup Workbench extended application class that writes the audit message. A generic audit-message handler writes the message text to the Related History page when the audit event results in *True.* Create other audit handlers if you need configured logic.
Message Set Number	Enter the message set reference of the audit message that the event handler writes to the Related History page.
Message Number	Enter the message set number reference of the audit message that is to be written to the Related History page.
Message Text	Select whether the audit message's *Explain* text or *Short* text is written to the Related History page.

Type Definition - Maintenance Conditions Workbench Page

Use the Type Definition - Maintenance Conditions Workbench page (RO_TYPE_DEEVENT) to define maintenance conditions by defining the data element events for the capture type.

Data elements and their associated classes drive the maintenance and audit processing for the capture type.

Navigation:

Click the **Maintenance Conditions** link on the Type Definition Workbench page.

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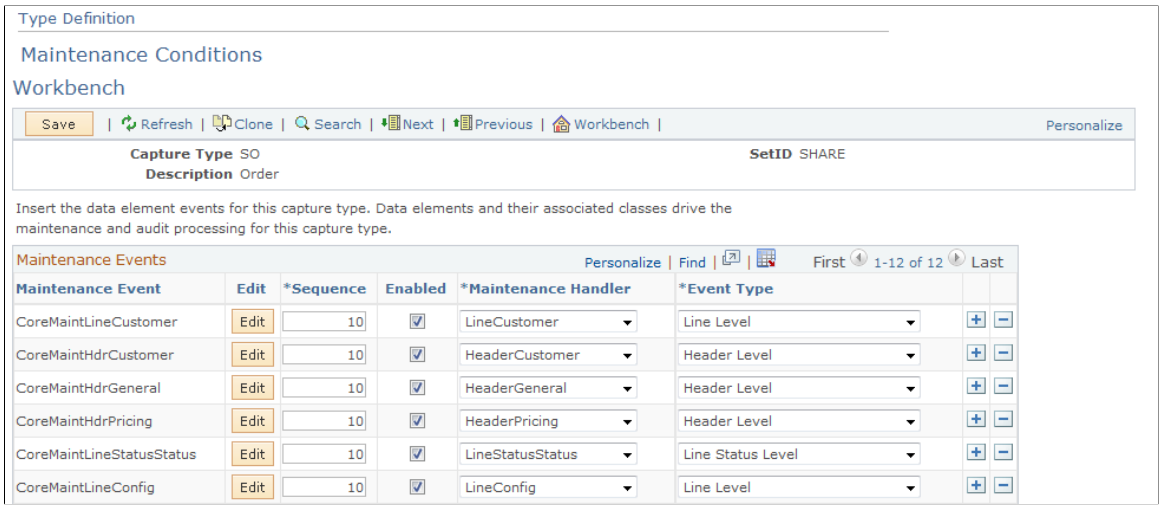
This example illustrates the fields and controls on the Type Definition - Maintenance Conditions Workbench page.



You can enable or disable maintenance events that you created when you defined maintenance handlers in the Setup Workbench. In maintenance setup, you connect maintenance events, maintenance handlers, and event types.

Note: If maintenance conditions are not defined on this page, hard-coded conditions are used.

Field or Control	*Description*
Maintenance Event	Displays a reference to the AAF term.
Edit	(Optional) Click to launch the Build Condition page, where you can create condition statements using AAF terms to determine when the maintenance event is fired.
Sequence	Enter the order in which the audit events fire when more than one audit fires.
Enabled	Select to enable the corresponding audit event.
Maintenance Handler	Select the data event handler (that you created in the Setup Workbench) that handles processing when the maintenance event evaluates to *True* or *False*. Based on the result of the event, logic is fired to make data elements of the capture editable or uneditable during a maintenance request. **Note:** Certain handlers also determine if a capture needs maintenance processing and whether it is allowed based on the evaluation of associated events.

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Field or Control	*Description*
Event Type	Select an event type that determines when the event is run, as well as the level of data that is passed to the maintenance handler. Enabler events are fired when a capture is first loaded. These events determine if maintenance processing is required based on the event definition. If they are required, the handler is invoked, and the system sets the capture internal logic set to *MaintenanceRequired.* Then, the system evaluates exclusive events to determine if the capture can be maintained. Whether or not the capture is maintained is determined as a consequence of the result of these events. When you request capture maintenance by clicking the Maintain button in the Order Capture toolbar, the system evaluates remaining events by header, line, and line status, based on the defined sequence. These events determine maintenance eligibility of data. After all events are run, the system presents the capture, with the appropriate editable and maintainable data, to the CSR.

Type Definition - Dynamic Events Workbench Page

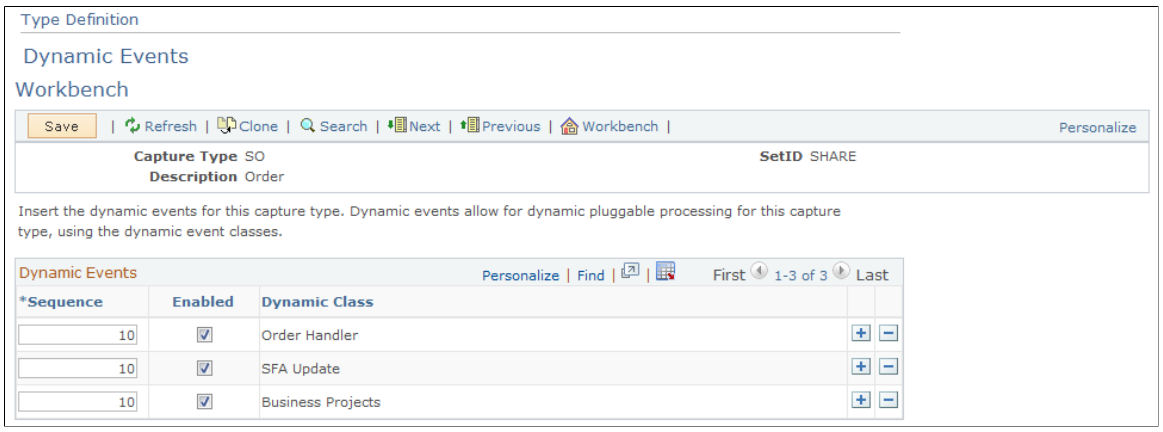
Use the Type Definition - Dynamic Events Workbench page (RO_TYPE_DYEVENT) to define dynamic events for this capture type.

Dynamic events allow for dynamic, pluggable processing for a capture type, using dynamic event classes.

Navigation:

Click the **Dynamic Events** link on the Type Definition Workbench page.

This example illustrates the fields and controls on the Type Definition - Dynamic Events Workbench page.



Field or Control	*Description*
Sequence	Enter the sequence in which the dynamic events fire. Events can fire simultaneously.

Field or Control	*Description*
Enabled	Clear this check box to disable loading for this application class.
Dynamic Class	Displays a reference class, which you create in the Setup Workbench. These classes dynamically fire during capture processing. **Note:** PeopleSoft CRM delivers events for component defaulting and component saving.

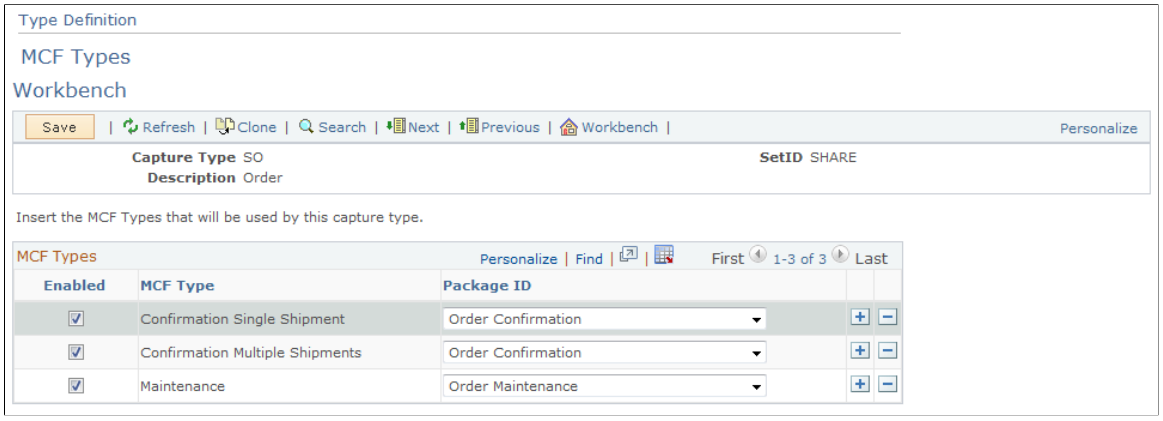
Type Definition - MCF Types Workbench Page

Use the Type Definition - MCF Types Workbench page (RO_TYPE_MCFTYPE) to define MCF types that this capture type uses.

Navigation:

Click the **MCF Types** link on the Type Definition Workbench page.

This example illustrates the fields and controls on the Type Definition - MCF Types Workbench page.



To define new correspondences, connect the MCF type and package ID. Once you complete this setup step, you can generate correspondence for Order Capture.

Field or Control	*Description*
Enabled	Select to enable the MCF type for the corresponding package ID.
MCF Type	Displays the event that you defined as an MCF type in the Setup Workbench.

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Field or Control	*Description*
Package ID	Select a package ID for Order Capture. Order Capture uses predefined templates that facilitate the creation of standardized communication between the user and the CSR. You make templates available to end users by grouping them in *template packages.* These packages can contain one or more *templates definitions,* which in turn reference *template files.* They also have package IDs, which are available for selection here. **Note:** This field contains a list of package IDs that are defined in the correspondence package definition with a usage of *Order Capture* and a language of *English.*

Related Links

"Correspondence and Notifications" (Automation and Configuration Tools)

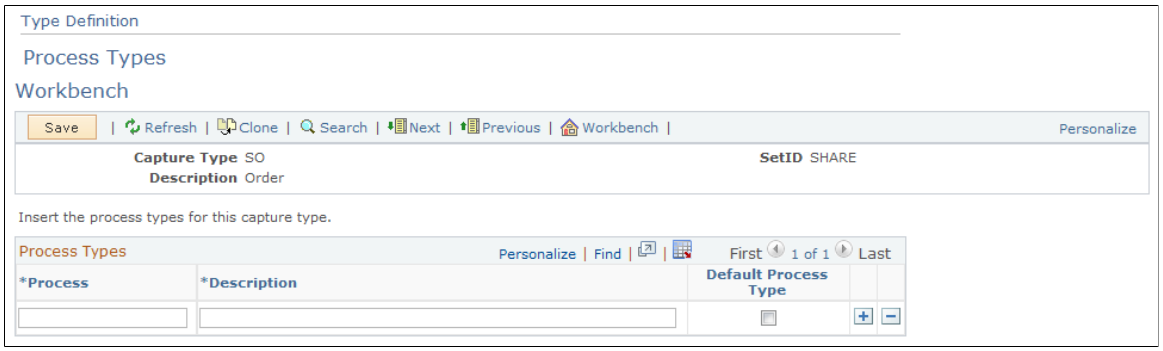
Type Definition - Process Types Workbench Page

Use the Type Definition - Process Types Workbench page (RO_TYPE_PROCTYP) to define process types for a capture type.

Navigation:

Click the **Process Types** link on the Type Definition Workbench page.

This example illustrates the fields and controls on the Type Definition - Process Types Workbench page.



Note: The PeopleSoft system does not use this capture type definition. However, certain industry-specific applications, such as the communications solution, create process types here.

Defining Integrations and Mappings

To define integrations, use the Integration Definitions (RO_DEFN_INTEGRATE_GBL) component.

Pages Used to Define Integrations and Mappings

Page Name	*Definition Name*	*Usage*
Integration Definitions Workbench Page	RO_DEFN_INTEGRT	Define integrations (such as mapping to fulfillment systems).
Integration Definitions - Header Status Mappings Workbench Page	RO_DEFN_HDSTMAP	Define status mappings at the header level to (and from) external systems.
Integration Definitions - Line Status Mappings Workbench Page	RO_DEFN_LNSTMAP	Define status mappings at the line level to (and from) external systems.
Integration Definitions - Source Mappings Workbench Page	RO_DEFN_INTSRC	Define source mappings to message nodes.
Integration Definitions - Inventory Business Units Workbench Page	RO_DEFN_INTEGRT	Specify inventory business units.

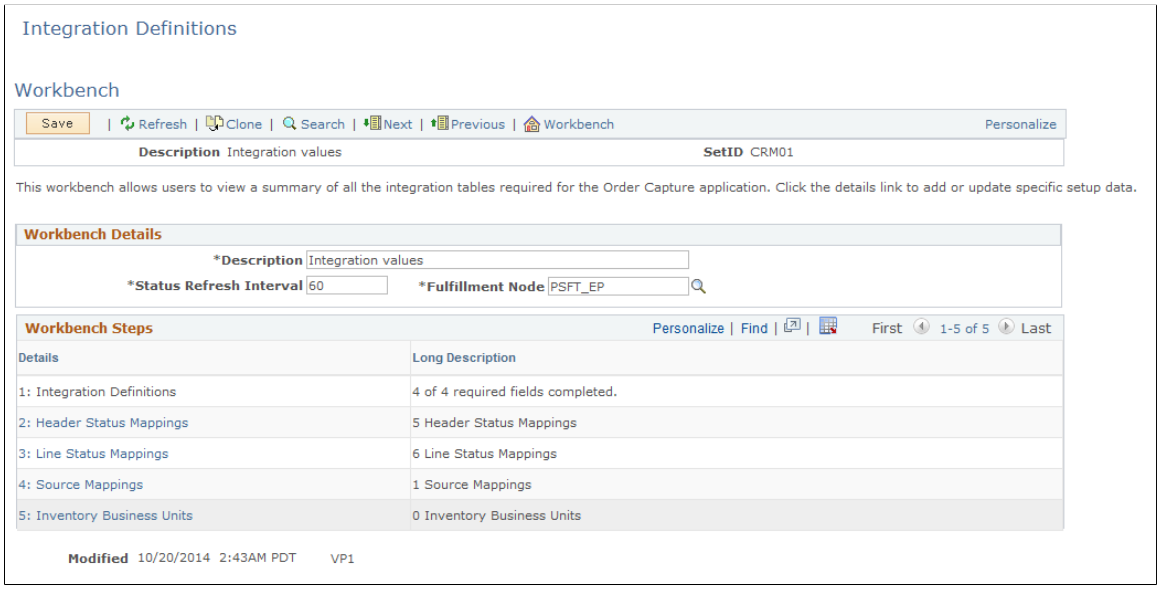
Integration Definitions Workbench Page

Use the Integration Definitions Workbench page (RO_DEFN_INTEGRT) to define integrations (such as mapping to fulfillment systems).

Navigation:

Set Up CRM > Product Related > Order Capture > Integration Workbench > Integration Definitions Workbench

This example illustrates the fields and controls on the Integration Definitions Workbench page.



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Workbench Details

Field or Control	*Description*
Description	Displays the description of the integration definition.
Status Refresh Interval	Enter the number of seconds that must elapse before the system carries out an additional status call. For example, if the interval is set to 60 (seconds), then the system makes only one status call per minute, regardless of how many times the user clicks the Refresh toolbar button.
Fulfillment Node	Enter the Integration Broker node name that the system uses to perform order fulfillment for this setID. Each of the defined header, line, and source mappings refer to this fulfillment node.

Workbench Steps

Field or Control	*Description*
Header Status Mappings	Click to access the Header Status Mappings page and define mappings between external-system statuses and internal PeopleSoft CRM statuses at the header level.
Line Status Mappings	Click to access the Line Status Mappings page and define mappings between external-system statuses and internal PeopleSoft CRM statuses at the line level.
Source Mappings	Click to access the Line Status Mappings page and define mappings between a message node and the corresponding source in PeopleSoft CRM.
Inventory Business Unit	Click to access the Line Inventory Business Units page and specify the business units in PeopleSoft Supply Chain Management (SCM) with which the current CRM setID integrates. The business unit is used during the product availability display.

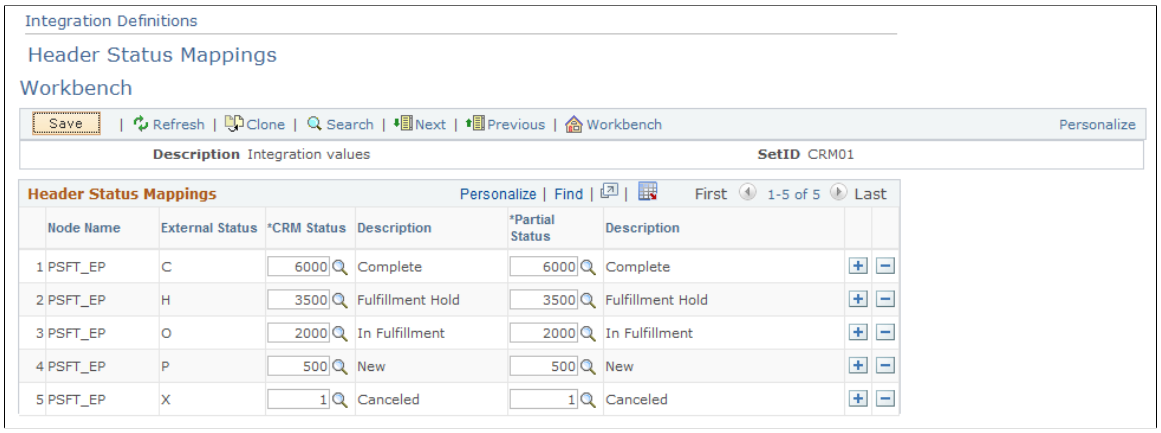
Integration Definitions - Header Status Mappings Workbench Page

Use the Integration Definitions - Header Status Mappings Workbench page (RO_DEFN_HDSTMAP) to define status mappings at the header level to (and from) external systems.

Navigation:

Click the **Header Status Mappings** link on the Integration Definitions Workbench page.

This example illustrates the fields and controls on the Integration Definitions - Header Status Mappings Workbench page.



For integrations, map PeopleSoft CRM header statuses and partial header statuses to their counterparts in the external fulfillment system.

Field or Control	*Description*
Node Name	Displays the message node that points to an external fulfillment system, which uses the statuses that appear in the **External Status** column.
External Status	Displays the equivalent of the PeopleSoft CRM status for an external system. (Typically, external systems use status values that are different from the status values that PeopleSoft CRM uses.) For example, a PeopleSoft CRM status of *6000* (complete) maps to a status of *C* in PeopleSoft Order Management.
CRM Status	Enter the Order Capture status.
Description	Displays the text equivalent value of the numeric status value that you enter. Define the description text for partial statuses in the Setup Workbench Header Statuses step.
Partial Status	Enter a partial status code for the header status mapping. Partial status codes are identified in the status header for an order that has order lines in different stages of the fulfillment cycle.

Integration Definitions - Line Status Mappings Workbench Page

Use the Integration Definitions - Line Status Mappings Workbench page (RO_DEFN_LNSTMAP) to define status mappings at the line level to (and from) external systems.

Navigation:

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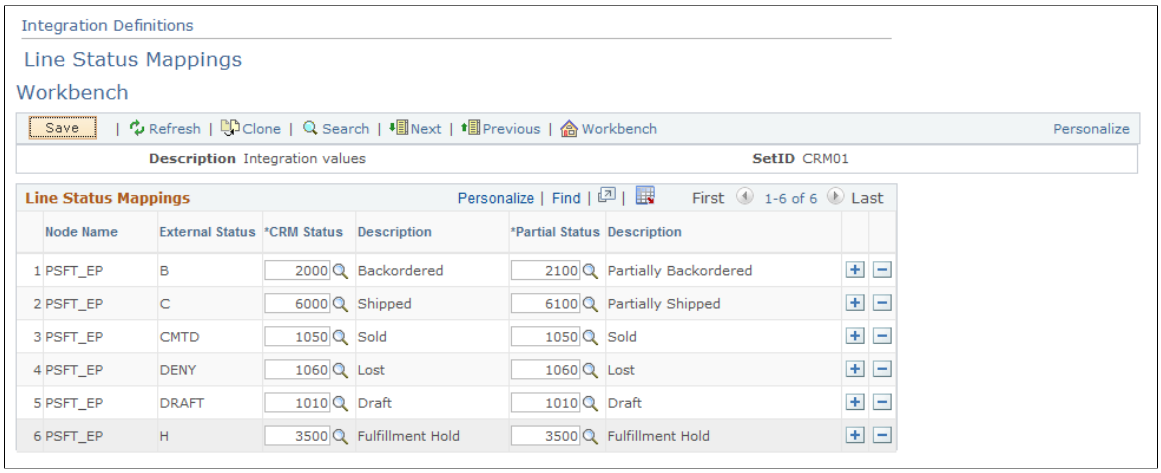
Click the **Line Status Mappings** link on the Integration Definitions Workbench page.

This example illustrates the fields and controls on the Integration Definitions - Line Status Mappings Workbench page.



For integrations, map PeopleSoft CRM line statuses and partial line statuses to their counterparts in the external fulfillment system.

Field or Control	***Description***
Node Name	Displays the message node that is associated with the data.
External Status	Displays the equivalent of the Order Capture order line status for the external system. (Typically, external systems use status values that are different from the status values that PeopleSoft CRM uses.) For example, a PeopleSoft CRM status of *4000* (in fulfillment) maps to a status of *O* (open) in PeopleSoft Order Management.
CRM Status	Enter the Order Capture line status code.
Description	Displays the text equivalent value of the numeric status value that you enter. The description of the partial status is visible to the CSR.
Partial Status	Enter a partial status code for the line status mapping. Partial status codes identify the status of an order that has order lines in different stages of the fulfillment cycle. Example: If one schedule on the line is back-ordered (2000) and another schedule is shipped (6000), then the partial status is the partial version of the bigger number—in this case, 6000.

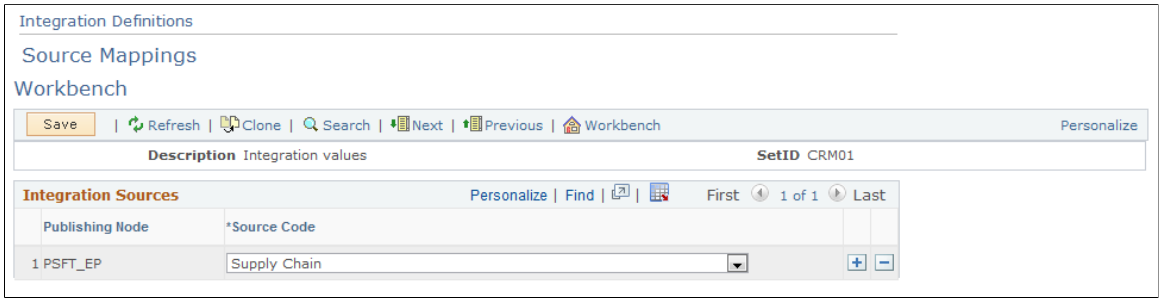
Integration Definitions - Source Mappings Workbench Page

Use the Integration Definitions - Source Mappings Workbench page (RO_DEFN_INTSRC) to define source mappings to message nodes.

Navigation:

Click the **Source Mappings** link on the Integration Definitions Workbench page.

This example illustrates the fields and controls on the Integration Definitions - Source Mappings Workbench page.



Field or Control	*Description*
Publishing Node	Displays the message node to which Order Capture sends data. The publishing node provides a mapping between the external node and the source code, which you define on the Source Codes page in the Setup Workbench. When you are using an external system to display an order, this mapping tells the system to which node to transfer the user and to display the order.
Source Code	Select the source code to which this data should map in Order Capture.

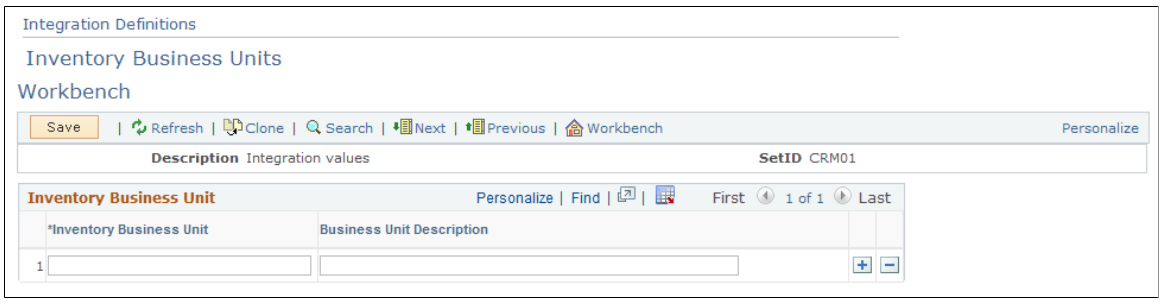
Integration Definitions - Inventory Business Units Workbench Page

Use the Integration Definitions - Inventory Business Units Workbench page (RO_DEFN_INTEGRT) to specify inventory business units.

Navigation:

Click the **Inventory Business Units** link on the Integration Definitions Workbench page.

This example illustrates the fields and controls on the Integration Definitions - Inventory Business Units Workbench page.



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Field or Control	*Description*
Inventory Business Unit	Enter the business unit in PeopleSoft SCM Inventory that Order Capture integrates with.

Setting Up Credit Card Integration

This section provides an overview of credit card integration.

Understanding Credit Card Integration

PeopleSoft CRM provides two options for processing credit card payments in transactions:

- Hosted payment: Users are transferred to the third-party hosted website (for example, Hosted Order Page by Cybersource) where they enter their credit card information for approval.

  When finished, the user is transferred back to the CRM transaction. The third-party vendor returns information such as approval code and token ID that the CRM transaction needs to continue the rest of the checkout process. This option shifts the burden of hosting and processing credit card information from the PeopleSoft system to the third-party vendor.

- Credit card encryption: Order Capture uses a third-party payment service for acceptance of credit cards as a payment type. Users enter credit card information in the PeopleSoft system (the information can be pre-populated from the customer profile if it is already on file) during checkout. Credit card information is encrypted, stored and maintained in the PeopleSoft system.

For more information on implementing either credit card integration option, “Understanding Credit Card Encryption” (Application Fundamentals).

Setting Up Freight Integration

To define carriers, use the Carriers (CARRIER) component.

Page Used to Define Carriers

Page Name	*Definition Name*	*Usage*
Carriers Page	CARRIER	Define carriers for integration with Order Capture.

Understanding Freight Integration Setup

After you correctly install your third-party freight (carrier) application, perform these steps from within the PeopleSoft CRM application to set up freight integration:

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1. Follow the instructions that are provided in the PeopleSoft CRM Installation Guide to properly configure your system.
2. Set up the freight calculation integration.
3. Add a freight calculation *vendor* to the business unit definition.
4. Test the freight calculation integration.
5. Define your carriers.
6. (optional) Construct tracking numbers.

Setting Up the Freight Calculation Integration

PeopleSoft CRM integrates with ConnectShip to calculate freight charges. The freight calculation integration transfers the to address, carrier, and combined product weights data to ConnectShip.

To set up the freight calculation integration:

1. Activate the following application messages: *RATE_REQUEST*, *RATE_REQUEST_XFRM*, and *RATE_RESPONSE*.
2. Confirm that the *ALLPAGES* permission list has full permission to the *FREIGHT* channel.

   Select **PeopleTools** > **Security** > **Permissions & Roles** > **Permission Lists** and open the *ALLPAGES* permission list. Select the **Message Monitor** tab and look for an entry for *FREIGHT.* If not found, add a new entry for the *FREIGHT* channel, and grant it full access.
3. Activate the *FREIGHT* channel through the Message Monitor, on the Channels tab.
4. Activate the *OutSync* node transaction on the node, *PSFT_XOUTBND,* for the *RATE_REQUEST* transaction.

   Select **PeopleTools** > **Integration Broker** > **Node Definitions**.
5. Activate the *OutSync* node transaction on the node, *PSFT_XOUTBND*, for the *RATE_REQUEST_XFRM* transaction.

   Note: This transaction uses an *HTTPTARGET* override connector and allows you to specify the URL to connect to Progistics.

   Replace the URL on the *RATE_REQUEST_XFRM* node transaction with your ConnectShip Progistics server URL, which uses the following format: *http://<machine>/Progistics/XML_Processor/Server/XMLProcDLL.asp*.

   If you are not using port 80 on the ConnectShip Progistics server, indicate the port in this URL: *<machine>:8080*
6. Select **PeopleTools** > **Integration Broker** > **Relationships** and activate the *RATE_REQUEST* relationship.

   On the Trans Modifier tab, select *Edit* and activate the *RATE_REQUEST* modifier.

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Testing the Freight Calculation Integration

When you test the integration, use UPS Ground as the carrier.

Note: To carry out the freight calculation test, you must have configured UPS Ground for your business unit on your ConnectShip Progistics server.

To test the freight calculation integration:

1. Open the Order Capture Business Unit definition in PeopleSoft CRM for the business unit that you set up.

   Select **Set Up CRM** > **Business Unit Related** > **Order Capture Definition**.

2. Click the **Test Freight Calculation** button.

   If an amount other than zero appears, you are set up correctly. If zero appears, check the display message to determine what is not correctly set up.

See Order Capture Definition - Internal Page.

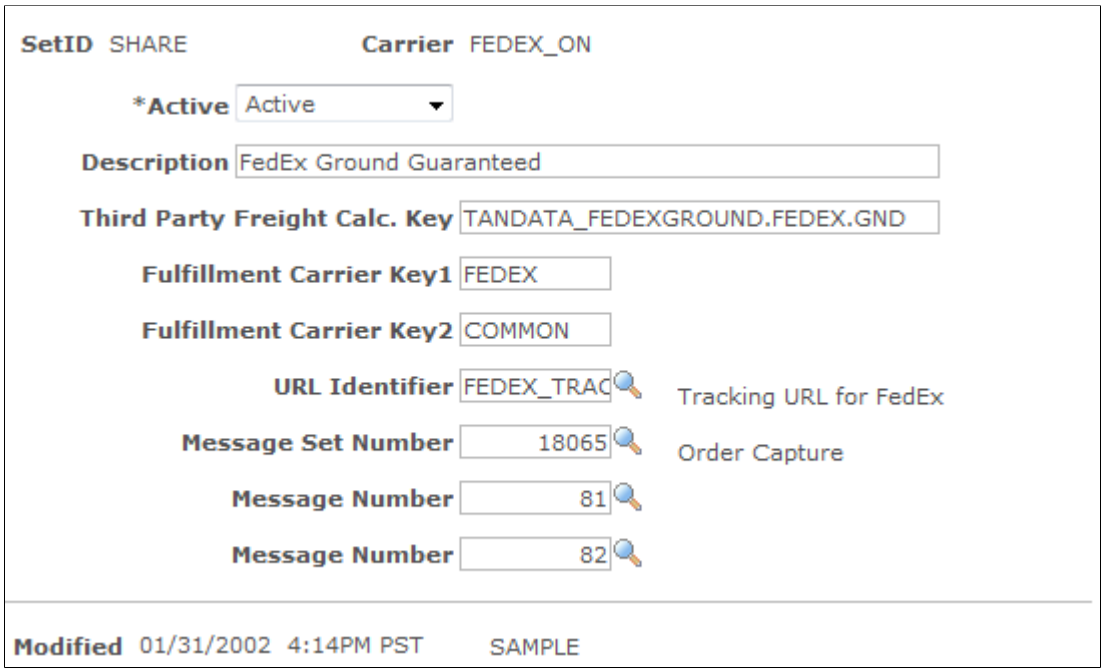
Carriers Page

Use the Carriers page (CARRIER) to define carriers for integration with Order Capture.

Navigation:

Set Up CRM > **Product Related** > **Order Capture** > **Carrier Definition** > **Carriers**

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



Field or Control	*Description*
Active	Select *Active* or *Inactive.* If you select *Inactive,* the carrier does not appear: • As a valid carrier in the order capture business unit definition for PeopleSoft CRM Order Capture Self Service. • On the order entry form for PeopleSoft CRM Order Capture.
Description	Enter a description that appears in several order capture locations where shipping information is defined.
Third Party Freight Calc. Key (third party freight calculation key)	Enter the key that the third-party freight calculation system (for example, the ConnectShip Symbol) uses to identify this carrier.
Fulfillment Carrier Key1 and **Fulfillment Carrier Key2**	Enter keys that map the PeopleSoft CRM carriers to the equivalent carriers in the fulfillment system. For example, if you use PeopleSoft Order Management as your fulfillment system, key 1 would map to Carrier ID, while key 2 would map to Ship Via Method.
URL Identifier	Use this URL to construct a link to the carrier's shipment tracking page.
Message Set Number	Displays two message numbers.
Message Number	Enter the message numbers that the system uses to construct the package tracking link.

Constructing Tracking Numbers

An order may consist of multiple shipments and, consequently, of multiple tracking numbers. Order Capture and Order Capture Self Service support the construction of a single tracking link, which displays all shipments at once.

To construct a tracking link:

1. Point the URL identifier to a URL definition.

   This is the static (unchanging) portion of the carrier's tracking URL.

2. If there is more than one shipment to track, ensure that the first message catalog entry message number is appended to the URL.

   Parameter %1 within the message is replaced by the package number (for example, *1* for the first package, *2* for the second package). The shipment's tracking number replaces Parameter %2. If only one shipment is being tracked, this message is not used in constructing the URL.

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3. For the last package, append the second message catalog entry to the URL using the same parameter replacement rules as the first message number.

Note: You use the second message catalog entry only if a tracking link is constructed for one package. If the second message catalog entry is not present, then you use the first message catalog entry.

UPS Example

If two United Parcel Service (UPS) packages are tracked at once, this link would work:

http://wwwapps.ups.com/etracking/tracking.cgi?sort_by=status&track=Track&TypeOfInquiryNumber=T&InquiryNumber1=444&InquiryNumber2=555

Note: PeopleSoft CRM ships with the URL definition UPS_TRACK, which is defined as http://wwwapps.ups.com/etracking/tracking.cgi?sort_by=status&track=Track&TypeOfInquiryNumber=T. PeopleSoft CRM also ships with a single message catalog entry: 18065, 80. This contains &InquiryNumber%1=%2.

When you construct this link, the URL definition is initially appended with this message catalog entry. Replace %1 with the first shipment number (1) and %2 with the tracking number for the first shipment (444), which yields this string: http://wwwapps.ups.com/etracking/tracking.cgi?sort_by=status&track=Track&TypeOfInquiryNumber=T&InquiryNumber1=444. The next shipment is the final shipment, but because there is no defined second message catalog entry, the first entry is appended once more. This becomes the final link: http://wwwapps.ups.com/etracking/tracking.cgi?sort_by=status&track=Track&TypeOfInquiryNumber=T&InquiryNumber1=444&InquiryNumber2=555.

FedEx Example

This link tracks two Federal Express (FedEx) shipments (tracking numbers 444 and 555):

http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=444,555.

The URL definition, FEDEX_TRACK, contains http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=. The message catalog entry 18065, 81 is %2, (note the comma). The message catalog entry 18065,82 is simply %2.

Note: FedEx does not use the %1 parameter (which is the shipment number).

For these two packages, the URL definition is initially appended with the first message catalog entry and becomes http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=444.

For the final package, the second message catalog entry is used and appended to the above string, resulting in http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=444,555.

If only one package is tracked, the second message catalog entry is appended to the URL definition, yielding http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=555.

Note: In the last example, the first message catalog entry was not used.

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Defining Tax Installation Options

To define tax provider options, use the Tax Provider Options (TAX_PROV_INFO) component.

This section provides an overview of tax installation options setup and discusses how to define tax provider options.

Page Used to Define Tax Provider Options

Page Name	*Definition Name*	*Usage*
Tax Provider Options Page	TAX_PROV_INFO	Define tax provider (Taxware or Vertex) options.

Understanding Tax Installation Options Setup

Order Capture works with third-party systems such as Taxware, Vertex, and WorldTax to calculate taxes on orders.

Once the preferred tax application is installed to work with PeopleSoft CRM applications, you must define tax settings for your business units and then define advanced tax installation options for either Taxware or Vertex. Taxware uses the STEP feature, while Vertex uses its Tax Decision Maker (TDM). If you use these, you must select the appropriate check boxes on the Tax Provider page.

Note: You can also take advantage of product groups.

Tax Settings for Business Units

Business units determine tax sets, which are entered when you define your business units on the Order Capture Definition page.

See Order Capture Definition - Internal Page.

Tax Product Groups

You can set up product tax groups to take advantage of the Taxware Product Matrix or the Vertex Product Taxability files in Vertex TDM.

A *tax product group* is a product group with a product group type of Tax, which you define in PROD_GROUP_TBL.

Note: If you organize your data wisely, using tax product groups reduces taxing errors and product maintenance time.

Each order line has a single product ID. You can associate a tax product group with each product. Order Capture sends the product ID and the tax product group through the interface, and Taxware or Vertex determines whether the product ID or product tax group takes precedence.

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Note: If you use Taxware, you can simplify data entry by creating tax product groups that are equal to any of the Taxware product codes that apply to your company's business. Create or update your product IDs with the tax groups that apply.

See “Defining Products” (PeopleSoft Product and Item Management).

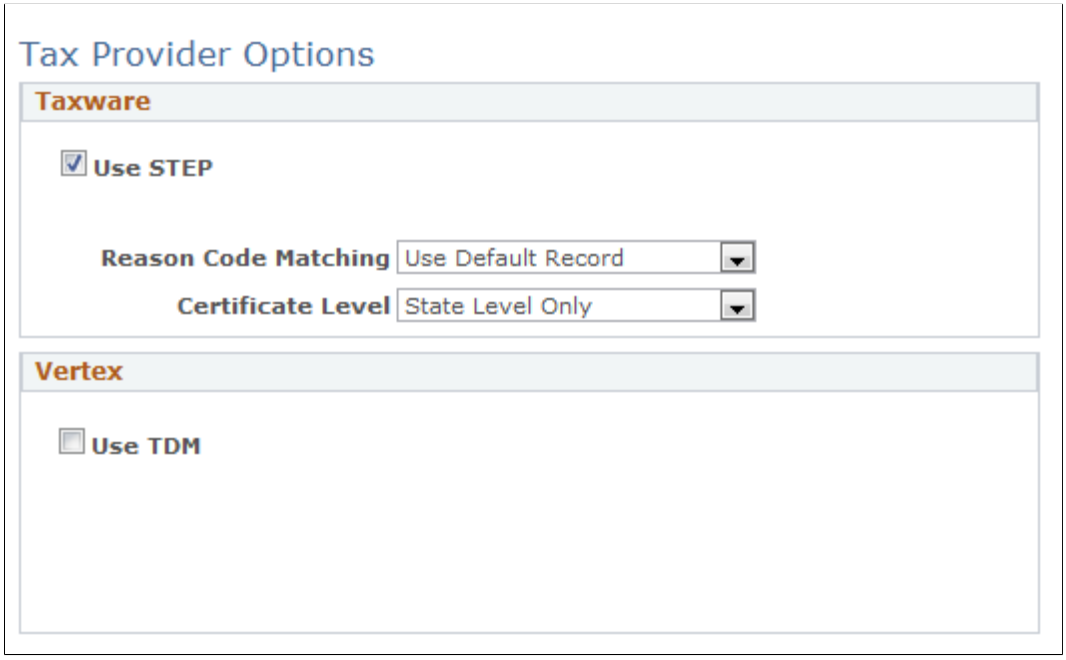
Tax Provider Options Page

Use the Tax Provider Options page (TAX_PROV_INFO) to define tax provider (Taxware or Vertex) options.

Navigation:

Set Up CRM > **Product Related** > **Order Capture** > **Tax Provider Options** > **Tax Provider Options**

This example illustrates the fields and controls on the Tax Provider Options page.



Taxware

Field or Control	*Description*
Use STEP	Select, if you are using the Taxware STEP module, to indicate that additional fields must be sent through the interface.

Field or Control	*Description*
Reason Code Matching	Select how you want to handle tax certificate entry reason lookup in STEP. Select *Exact Reason Code Match,* the more restrictive of the two options, to have Taxware find only tax certificates that were entered with the exact reason code that you set up on the order line. If you select *Use Default Record,* Taxware looks for an exact match. If it does not find one, it uses a default tax certificate for exemption.
Certificate Level	Select which taxing jurisdiction level tax certificates apply. If you select *Individual Certificate Levels,* STEP looks for certificates at all individual levels and exempts tax only for the levels at which a certificate is found. *State Level Only* prompts STEP to look for a certificate only at the state level.

Vertex

Field or Control	*Description*
Use TDM	Select to use the Vertex TDM application to set up exceptions to taxability rules in the states where they apply. In TDM, you can set up product classes, which are equivalent to tax product groups and product IDs. You can decide whether to use product IDs or product classes.

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Chapter 5

Understanding Product, Pricing, Proration, and Catalogs

Products, PeopleSoft Enterprise Pricer, and Catalogs

This section discusses the integration of products, pricing, and catalogs with Order Capture.

Products

Product definitions provide the foundation for many features of PeopleSoft Customer Relationship Management (PeopleSoft CRM), including product ordering, catalogs, and catalog searches.

You can use many of the elements used to define products—such as product brand, product category, product group, and product attributes—to dynamically generate catalogs based on criteria that you specify. For example, you can create rules that select only certain brands for inclusion in a catalog or that include products based on their attributes.

Pricing

PeopleSoft Enterprise Pricer enables real-time, dynamic pricing on quotes and orders based on company pricing policies. Order Capture users define rules that determine which discounts, surcharges, giveaways, and conditions apply. As products are added to a quote or an order, PeopleSoft Enterprise Pricer applies all of the pricing rules that match the defined conditions to determine final prices. Conditions might include number of products ordered, type of customer, or customer region. The same pricing engine also allows customer service representatives (CSRs) to manually adjust prices and view all price adjustments related to an order or a quote.

Catalogs

The PeopleSoft CRM Catalog contains a hierarchy of products that Order Capture and Order Capture Self Service can access. You can access catalogs from different locations within the collaborative selling suite of applications. Users can navigate directly to Catalog Search and enter search criteria in the search dialog box, or configure the PeopleSoft CRM portal homepage to display a catalog search pagelet. You can also navigate to the catalog by using the order form.

Note: To navigate to the catalog by using the order form, you must have the PeopleSoft CRM Portal Pack installed.

Using the order form, CSRs can search catalogs for product information. Order Capture Self Service customers can also view catalog information.

In addition, you can restrict user access to a product by validating it against a catalog when the product is added to an order.

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If you try to submit a product without linking it to a catalog, the order is held with the message *Product (number), (Name) on Line 1 is not in the Customer's Product Catalog*. You have two choices:

- You can override the hold by changing the hold status.
- You can turn off this hold.

  If you turn the hold off, it will never fire for any CSRs. If you do not want to use catalogs at all in the system, or you do not care if customers order products not in their catalog, then you can simply turn the hold off via the Order Capture Workbench.

  To turn off this hold, navigate to **Set Up CRM** > **Product Related** > **Order Capture** > **Capture Type Workbench.** Choose the **SetID** you are working with. Change the Capture Type codes for each scenario. Start with Quote or Order. Chose **Hold Processing**. Clear *Product Catalog Violation* and save.

Note: The default catalog in **Find Products** in the left navigation changes after selecting a different business unit in the **Add Order** page. This ensures that the CSR will see consistent catalogs while being in **Add Order** or in **Find Product**.

Product Setup

To define products and packages in PeopleSoft CRM, you:

1. Create definitional elements to associate with product elements such as product brand, product category, and competency codes.

   These are reusable attributes that you associate with product IDs in step 2 to create unique product and package definitions.

2. Create the product and associate definitional elements (as well as other product attributes and parameters) with the product IDs.
3. Assign product units of measure on the Product Attributes by UOM page.
4. Define package components on the Package Components page (for products defined as packages).
5. Establish product prices using the Product Price page (for individual products and packages with top-level pricing) or the Product Component Pricing page (for packages using component-level pricing).
6. Define product relationships on the Product Relationships page.
7. Associate standard or custom notes with products on the Notes page.

Related Links

“Understanding Products in PeopleSoft CRM” (PeopleSoft Product and Item Management)

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Pricing Setup

Refer to the PeopleSoft Enterprise Pricer product documentation on how to set up and use PeopleSoft Enterprise Pricer.

Proration of Price Adjustments

This section provides an overview of adjustment price proration and discusses:

- Order level adjustments.
- Price adjustment history.
- Proration of adjustments per line.
- Customer billing integrations.

Order Level Adjustments

Order Capture enables you to prorate order level adjustments when creating and maintaining orders and quotes. To use this functionality, you must create a Total Order Discount/Surcharge price rule in Enterprise Pricer.

Proration of order level adjustments consists of three major components:

- Configuring the application to use proration.

  A field on the business unit determines if the order level adjustments are prorated or not.

- Dividing adjustments over the order lines.

  The ratio for the prorated adjustment considers the net price of each line with the quantity ordered in order to prorate the order level adjustment appropriately.

- Displaying adjustment history.

  The history table keeps track of the adjustments that are applied to each line. Any adjustment that affects the net unit price is reflected in the history table.

These guidelines apply to creating orders with an order level adjustment:

Guideline	***Description***
Different adjustment types	More than one order level adjustment can be applied to the order at the same time. These adjustments can be either a fixed amount or a percentage.

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Guideline	***Description***
Manual order level adjustments	You can add a manual adjustment that will apply to the entire order. The manual order level adjustments are grouped with the order level adjustments that were applied by the Enterprise Pricer. The sum of both the manual and system adjustments gives the total order amount that will be prorated.
Order level discount across order lines	The ratio for the prorated adjustment considers the net price of each line with the quantity ordered in order to prorate the order level adjustment appropriately.
Price adjustment history	The history table keeps track of the adjustments that are applied to each line. Any adjustment that affects the net unit price is reflected in the history table.
Repricing an order	When proration is turned on, it is performed every time the order is repriced.
Order of adjustments	The adjustments from price rules defined to be applied at the line level are always applied first. The manual adjustments are applied second and price protect the line. The prorated order level adjustments are applied last.
Discount/Surcharge in the total section	When the order level adjustments are prorated, the fields use to store the order level adjustment on the order are set to 0. The Discount/Surcharge rows in the total grid are hidden.
Holds	By adjusting the price on a line with a prorated adjustment, it is possible that the order will go on hold if the price goes under the minimum selling price. The existing holds are applied.
Package Products	Package products are prorated just like other products on the order. Pricing for these can be at the component level, or at the product header level.

The following guidelines apply to maintaining orders with an order level adjustment:

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Guideline	***Description***
Protected prorated adjustments	Order lines with these statuses protect the prorated amount for that line: • 5000 – *Picked* • 5100 – *Partially Picked* • 5500 – *Purchased* • 5600 – *Partially Purchased* • 5700 – *Billed* • 5750 – *Partially Billed* • 6000 – *Shipped* • 6010 – *Complete* • 6100 – *Partially Shipped* **Note:** When the prorated amount is protected, it is not recalculated every time the proration calculation is done.
Cancelled order lines	When prorating the order level adjustments, the lines that are cancelled are excluded from the proration, as well as Engagement Service products.
Adding product to order	Adding a product to the order forces the proration to be done again.
Changing existing order line	Change to an existing order lines forces the proration to be done again.
Deleting order line	Deleting an order line forces the proration to be done again.
Minimum order level adjustment	If an order is being maintained, it is possible that the prorated adjustments that are protected based on the line status will be higher than the new order level adjustment that will be calculated after the order is changed. In this case, the amounts that are protected will remain the same and won't be decreased to match the new order level adjustment.

The following guidelines apply to converting a quote with an order level adjustment to an order:

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Guideline	*Description*
Calculation of order level adjustments for orders that come from a quote.	There is no flag on the order that can be use to indicate that the order level adjustments are price protected. This flag exist only for the line prices. When an order is created from a quote, the Related Actions tab on the order contains a reference to the originating quote. This reference is used to determine if the order level adjustment should be recalculated, or if the one calculated on the quote should remain.
Proration of order level adjustments for orders that come from a quote.	When an order is created from a quote, there is no proration of order level adjustments done on the order. The proration is done only on the quote. If the business unit is set up to allow for editing the order following conversion from a quote, then any changes made to the order results in recalculating the prorated adjustments.

Proration of Adjustments Per Line

The following guidelines apply to prorating the order level adjustment per line:

Guideline	*Description*
Order lines included in the proration	Order lines that are cancelled or that already have a prorated adjustment that is protected are not included in the proration. Both scenarios do not apply to Engagement Service products.
Order lines excluded in the proration	Order level adjustments that have already been billed should remain the same and should not be reapplied. For example: an order was created with 4 order lines and a prorated order level discount of 20$ had been prorated evenly across these lines (each line receiving 5$ discount). Line 1 has been billed and the other lines have not. If you maintain the order and add a fifth line, the 20$ order level discount still applies. When the proration is done again, instead of giving 4$ per line, the line that was billed will keep 5$ of the 20$ and the other 15$ will be divided across the 4 other lines.
Displaying order level adjustments as an amount	Order level adjustments can be both a percent and an amount. The total adjustment is calculated as an amount so that the amount can be divided across the lines.
Net unit price adjustment	The net unit price on the line is the price that gets updated. Order Capture does not store the extended price for a line. The net unit price multiplied by the quantity gives the extended price. The order quantity is included when calculated with the adjustment ratio applied.

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Guideline	*Description*
Adjustment ratio calculation	The following formula is used to find the adjustment to apply to the net price on the line: ((Order Level Adjustment – Protected Amount)* (Net Price)/ (Order Sub Total – Extended Line Price of Protected Lines)).
Price protected lines	The prorated adjustment amount can be applied to a line, even if that line is protected.
Giveaway products	Giveaways lines are excluded from the proration
Free periods products	Free Periods lines are excluded from the proration

Calculation Example

If an order has these two lines:

Product	*Quantity*	*List Price*	*Extended Price*
1000	3	20.00	60.00
1001	7	15.00	105.00
Total order price	165.00		

To prorate an order level discount of $20.00 USD, first calculate what the unit price of each product must be to arrive at the discounted order amount:

- For product 1000, the discounted unit price is $20.00 - (20.00 * 20.00 / 165.00), or $17.58 USD.

  The extended price is 3 * 17.58, or $52.74 USD.

- For product 1001, the discounted unit price is $15.00 - (20.00 * 15.00 / 165.00), or 13.18 USD

  The extended price is 7 * 13.18, or $92.26 USD.

In this scenario, the $20.00 order-level prorated discount needs to be proportionately distributed between the two order lines, therefore, the calculations of the actual discounts for order lines of products 1000 and 1001 are (20.00 * 20.00 / 165.00) and (20.00 * 15.00 / 165.00) respectively.

The order total is $52.74 + $92.26, or &145.00 USD.

Note: When line quantities are greater than 1, the entire discount amount might not prorate evenly across the order lines. For example, using an order discount of 20.05 in the above scenario, would the result in only USD $20.03 of the discount being applied. The remaining $02 USD cannot be evenly spread to a unit price when the line quantities are 3 and 7, and therefore remains unapplied.

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Price Adjustment History

The following guidelines apply to reviewing price adjustment history:

Guideline	*Description*
Prorated adjustments on the price adjustment page	The price adjustment history page shows all the adjustments that are applied to the list price in order to calculate the net unit price. The prorated adjustments are displayed on this page.
Deleting history rows	The Adjustment History page allows the user to delete an adjustment that was applied manually. System adjustments and prorated adjustments cannot be removed. To remove prorated adjustments that result from a manual order level adjustment, remove the manual order level adjustment. You cannot remove prorated adjustments that result from a price rule.
Add a Final Unit Price to the adjustments page	Final Unit Price reflects the list price with discounts subtracted, and surcharges added. This is displayed in the Unit Price field on the order line.

Customer Billing Integrations

The current integration to Supply Chain Management (SCM) and TBP will not be affected by the changes made for prorating the order level adjustments.

The following guidelines apply to billing integrations to Supply Chain Management (SCM) and TBP:

Guideline	*Description*
Integration to TBP with proration turned ON	When proration has been turned ON, the order level adjustments will be prorated across the order lines and passed to the TBP as part of the line price. No adjustments are stored at the order level.
Integration to SCM and TBP with proration turned ON	When proration has been turned ON, and the order/quote contains products that are passed to TBP and other that are passed to the fulfillment system, the order level adjustments will be prorated across the order lines and passed to SCM and TBP as part of the line price.
Integration to TBP with proration turned OFF	When proration has been turned OFF, the order level adjustments will be stored at the order level but they won’t be passed to TBP.
Integration to Supply Chain Management (SCM) with proration turned OFF	When proration has been turned OFF, the order level adjustments will be stored at the order level and they will be passed to SCM as an order level adjustment.

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Guideline	*Description*
Integration to Supply Chain Management (SCM) and TBP with proration turned OFF	When proration has been turned OFF, and the order/quote contains products that are passed to TBP and other that are passed to the fulfillment system, the order level adjustments will be stored at the order level and will be passed to SCM as an order level adjustment.

Catalog Setup

PeopleSoft CRM enables you to define the layout and content of online product catalogs for internal and external use. You define the look and feel of catalogs by creating display templates, and then define the contents that you want to organize and present according to your template definitions. You can designate products for inclusion in a catalog either by direct association (using product IDs) or by creating business rules to dynamically build product content based on the selection criteria that you define. Similarly, you can control user access to catalogs (as well as tailor catalogs to users) by directly associating user IDs with specific catalogs or by setting up business rules to establish permissions.

Related Links

“Understanding Catalogs” (PeopleSoft Product and Item Management)

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Chapter 6

Working with Order Capture Business Projects

Understanding Order Capture Business Projects

PeopleSoft Customer Relationship Management (PeopleSoft CRM) delivers business projects that automatically manage certain predefined application processes. Using a business project to manage these tasks simplifies the management of conditional logic that often varies based on industry- and customer-specific needs.

Order Capture delivers three prebuilt business projects, each of which is a combination of phases and tasks designed to manage the order capture business process. Order Capture business projects are advantageous because they automate the processing steps for orders and quotes. To enable the configuration of key order processing events, Order Capture uses business projects as the agent to initiate and verify those events. Specifically, they trigger and confirm the status of key events, such as email confirmation, creation of installed product records, publishing of data to a fulfillment system, and notification of shipment completion.

Note: Order Capture business projects are registered as actions related to the order and can, therefore, be found on the Related Actions page of the Order Capture component.

This table describes the three core Order Capture business projects that the PeopleSoft system delivers:

Business Project	*Object Name*	*Event Name*	*Internal Description*	*Triggering Event*
Order	CORE_ORDER_BP	CoreOrderBP	Order Capture BP	The order status changes to *Submitted.* The business project is instantiated when the **STATUS_CODE** field on the RO_HEADER record equals a code status of 1000.

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Business Project	*Object Name*	*Event Name*	*Internal Description*	*Triggering Event*
Order Maintenance	CORE_ORD_CHG_BP	CoreMaintBP	Order Change BP	When an order is maintained and submitted, the system saves changes to the order to RO_HISTORY. When an RO_HISTORY record is created with *Open* status, the CoreMaintBP event is triggered. The business project is instantiated when the **RO_HISTORY_STATUS** field on the RO_HISTORY record changes to *Submitted* status.
Quote	CORE_QUOTE_BP	CoreQuoteBP	Quote BP	The quote status changes to *Submitted.* The business project is instantiated when the **STATUS_CODE** field on the RO_HEADER record equals a code status of at least 1000.

Understanding the Order Bridge

The Order Bridge provides an alternate view of order progress than a business project. Each task in a business project might generate additional system tasks, for example, notifications, Application Engine (AE) processes, and messages sent or received from other external PeopleSoft applications or third-parties. These tasks do not appear on the Business Project page, but they do appear on the Order Bridge.

Each business project that is associated with an order appears separately. Order Bridge is accessible only from the Fulfillment tab on the Order page. Events appear in a hierarchical view with the business project at the top, followed by phases, tasks, and events that are generated by the task, including subprojects.

Defining Order Capture Business Projects

This section provides an overview of business project definition and discusses how to set up and view Order Capture business projects.

Note: This section supplements the general PeopleSoft CRM documentation, which explains how to set up business projects for all PeopleSoft CRM applications. Because Order Capture delivers a centralized Capture Type Workbench, the method to set up business projects differs slightly from other PeopleSoft CRM applications.

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Related Links

Understanding Order Capture Business Projects

Understanding Business Project Definition

Order, quote, and maintenance business projects, like other business projects, are broken down into phases, tasks, and transition rules. *Tasks* are the basic unit of work in a business project. *Phases* represent groups of tasks. When you create phases, tasks, and transition rules, you define the central element of the business project. *Transition rules* establish the conditions by which the business project moves from one phase to the next.

Term	***Definition***
Phases	Phases encapsulate one or more related tasks and constitute the main steps of the business project. Phases are always performed sequentially. For each phase in a business project, you define its possible target phases and the conditions under which each target is appropriate. These conditions are called *transition rules.* Order Capture business projects contain several phases. For example, the order business project (CORE_ORDER_BP) has eight main phases, but the quote business project (CORE _QUOTE_BP) has only two phases. These specific phases are explained below.
Tasks	When you set up a phase, you define the sequence of tasks in the phase. Tasks are single actions that directly correspond to an Application Engine program or Data Mover script. A new task begins when all preceding tasks in a phase are complete. Tasks within a single phase can be performed either in parallel or in sequence. To define tasks in parallel, you assign each task the same sequence number. Sequence numbers for several tasks in Order Capture business projects have the same sequence number and are, therefore, performed simultaneously. **Note:** To view sequence numbers, access the Capture Type Workbench, Business Projects page. See Type Definition - Business Process Conditions Workbench Page.
Transition Rules	Transition rules determine the transition from one phase to the next, based on the success or failure of tasks within the phase. The outcome of a task can be: • *Cancelled*. • *Complete - Success.* • *Complete - Failed.*

Related Links

"Defining Tasks" (Automation and Configuration Tools)

"Defining Phases" (Automation and Configuration Tools)

Setting Up and Viewing Order Capture Business Projects

Out-of-the-box, PeopleSoft delivers hardcoded conditions to determine the triggering action that first launches the business project. These hardcoded conditions can be overridden by defining your own condition. This is done from the Capture Type Workbench: **Set Up CRM** > **Product Related** > **Order Capture** > **Capture Type Workbench**, in the Business Process Conditions page.

Click on the **Edit** button to edit the condition. You then use the AAF condition builder, selecting AAF Terms defined for Order Capture, and the proper operators and values.

When defining the **Event Name** within the Capture Type Workbench, the system is expecting certain names, and if an unrecognized name is used, it will assume that the Business Project tied to that event should always be run, depending on the condition defined. When no condition is defined for an unrecognized event name, the business project will always be run when an order is submitted.

Access the Business Process Conditions page in Capture Type Workbench: **Set Up CRM** > **Product Related** > **Order Capture** > **Capture Type Workbench**. Select a capture type and click the Business Process Conditions link on the Type Definition Workbench page that appears.

Here you can perform the following tasks on the Business Process Conditions page:

- Add business project events that are triggered for the Order or Quote.
- Enable or disable delivered business projects.
- Alter the sequence of the business project events so that they are triggered sequentially or in parallel.
- Allow multiple instances of the business project.

  This task is recommended for Order Maintenance but not for Order or Quote.

See "Understanding Business Projects" (Automation and Configuration Tools).

Viewing Order Capture Business Projects

This section discusses how to view the Order Capture business project tree and review its phases.

Page Used to View Order Capture Business Projects

Page Name	*Definition Name*	*Usage*
Business Project Status Page	RC_BP_STATUS	View the status of all three Order Capture business projects.

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Related Links

"Understanding Business Project Tracking" (Automation and Configuration Tools)

Business Project Status Page

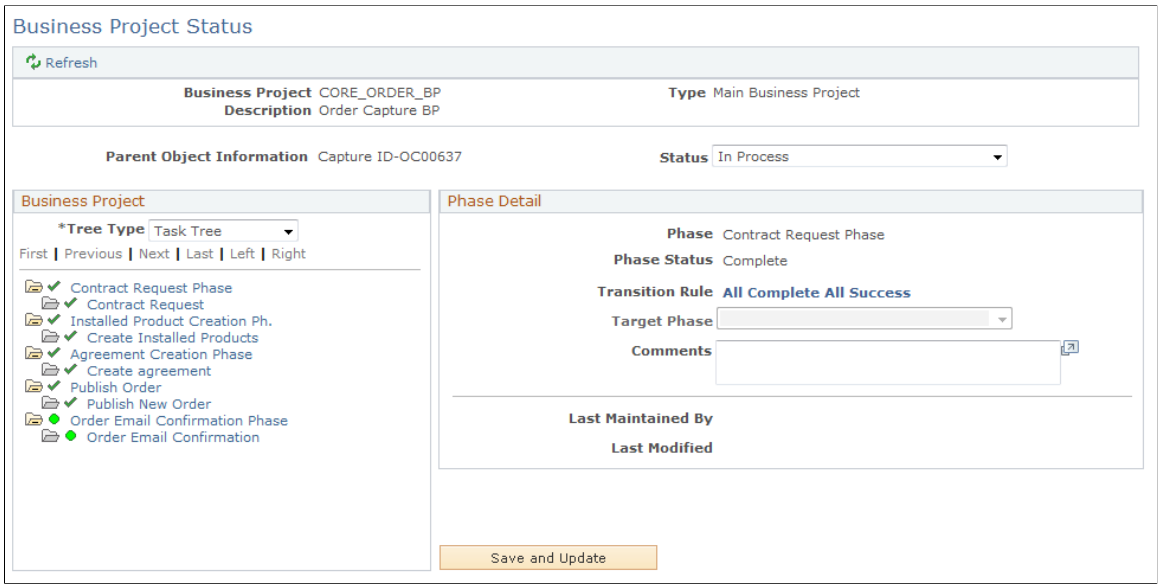
Use the Business Project Status page (RC_BP_STATUS) to view the status of all three Order Capture business projects.

Navigation:

Orders and Quotes > **Search Orders and Quotes** > **Related Actions**

Click the **View Details** button on the Related Objects page.

This example illustrates the fields and controls on the Business Project Status page.



The Order Capture business project tree provides a visual representation of the business project. The left side of the page displays all phases and their possible targets. Clicking a phase causes the right side of the page to display details such as the phase's task list and the transition rules for each of its targets. The first phase appears at the top of the tree, and each time a transition to a different phase occurs, that new phase is added to the tree. Because business project definitions permit any phase to transition to any other phase, a single phase can be instantiated more than once and, as a result, can appear multiple times in the tree.

Note: Only phases that have been instantiated appear in the tree. The system does not display future phases because it cannot tell which ones will be instantiated.

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Field or Control	*Description*
Status	Enter the overall status of the Order Capture business project. When you first invoke a business project, the status is *In Process.* You can manually change the status to *Cancel* any time before the business project is finished. When the project is finished, the system updates the status to *Complete.* You cannot manually set the business project status to *Complete.* The only way to complete a business project is to transition from the last activity either manually or automatically.
Outcome	Appears only for sub-business projects whose outcomes are set manually. Once the sub-business project is complete, set the outcome to either *Success* or *Failed.*
Description	Displays the text from the field specified on the Parent Object page of the business project definition. If the information is not descriptive enough, return to the parent object to modify it. The description is the only information provided about the parent object from which this business project was invoked.
and	These icons appear at the top level of the tree hierarchy. They indicate phases that have been instantiated. They enable you to expand and collapse the tree.
	Indicates the second level of the tree hierarchy.
	Indicates that the task or phase is in progress.
	Indicates that the task or phase is canceled.
	Indicates that the task was successfully completed or that the phase is complete. **Note:** Phases do not distinguish between successful and unsuccessful completion.

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Field or Control	*Description*
	Indicates that the task has failed. **Note:** This icon does not necessarily mean that the task will end. For example, the Order Maintenance business project automatically checks shipment status every 120 minutes. If no shipment has been made or if the order has not been canceled, the task displays this icon, and the business project repeats the task. The task continues to kick off every two hours (placing this icon in the Tree Viewer each time) until successful. For each instance of no shipment or order cancellation, you see this icon in the tree.

Phase Detail

This region appears when you select a phase from the business project summary region.

Field or Control	*Description*
Phase	Displays the name of the phase currently selected in the business project tree.
Status	Displays the phase status. Values are: *In Process, Complete,* or *Canceled*. (If you cancel a business project, the phase that was in progress is also canceled.) Phase statuses don't distinguish between successful and unsuccessful completion.
Transition Rule	Displays how the system transitioned to the selected phase, or indicates that transition was performed manually. If the phase is not complete, no text appears.
Target Phase	To make a manual transition, select the next phase and save the page. You can do this only if the transition definition specifies a manual transition. Manually transitioning out of a phase changes the source phase's status to *Complete,* but it does not affect the status of any of the incomplete tasks in the source phase.

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Updating the Tree

Field or Control	*Description*
Save and Update Tree	Click to save changes to the page and to update the business project tree based on those changes. For example, click this button to complete a manual transition after you select a phase from the **Target Phase** drop-down list box.

Reviewing Phases of the Order Business Project

Order Business Project (CORE_ORDER_BP) Phases

Field or Control	*Description*
Contract Request	If the PeopleSoft Contracts integration is active, this phase examines the Contract Mapping table for the Customer and Business Unit on the order to determine if a contract number exists. If it does, this phase is marked *Complete*. If no contract number exists for this customer and business unit, a Contract Request message is sent to the PeopleSoft Contracts system, and the phase waits until PeopleSoft CRM receives a response from PeopleSoft Contracts with the contract number. Once the response is received, this phase is marked *Complete.* If the integration with Transaction Billing Processor (TBP) in PeopleSoft Contracts is not active, this phase is set to *Complete* automatically and the business project moves on to the next phase. **Note:** The Workflow Rule RO Contract Request, which is the event performed by the CONTRACT_REQ task, runs the Application Engine program RO_CONTR_EIP.

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Field or Control	*Description*
Installed Product Creation	For order lines that require installed products, this phase creates the installed products with the status as indicated in the Product Definition component. The order may contain products that require an installed product, as indicated by the Installed Product page in the Product Definition component. In addition, when creating installed products for serialized items, the system creates one installed product for each quantity ordered. For nonserialized items, the system creates a single installed product for the entire quantity ordered on the order line. Installed products contain values from the order, such as customer information, site, order ID, and quantity ordered. **Note:** The Workflow rule RO_Create Inst Prod, which is the event performed by the CREATE_IP task, runs the Application Engine program RO_CREATE_IP. See “Defining Products” (PeopleSoft Product and Item Management).

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Field or Control	*Description*
Publish Order	If the CRM system is set up to fulfill orders by an external system, the Publish Order phase publishes order details. The CRM_SALES_ORDER application message must be active for the phase to perform this task. **Note:** The Workflow rule RO_EIP Publish, which is the event performed by the PUB_NEW_ORDER task, runs the Application Engine program RO_EIP_PUB. If your ordering process does not include an integration to a supply chain management system for order fulfillment, remove this phase from the business project to avoid getting errors from the RO_EIP_PUB process. To do so: 1. Make a copy of the business project using the Business Project Definitions Save As page. You cannot modify the business project directly if an instance of it is currently in process. 2. Delete the Publish Order phase from the Transitions page on the newly cloned business project. Make sure to update the Source and Target phases to account for the removal of the phase. Save the new business project. 3. Replace the current business project with this new business project on the Type Definition - Business Process Conditions Workbench page for the appropriate setID and capture type. See Understanding Fulfillment Integration.
Order Email Confirmation	This phase uses the Multi-Channel Framework to send an email confirmation to the primary email address of the contact on the order. On completion of this phase, the system creates a *correspondence* entry on the Related Objects page of the order. The confirmation email provides a current snapshot of the order, including order number, status, order line details, order totals, and shipping details. If no primary email address exists for the order contact, no email confirmation is sent. **Note:** The Workflow rule, RO Order Email Confirmation, which is the event performed by the ORDER_EMAIL task, runs the Application Engine program RO_SND_EMAIL.

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Field or Control	*Description*
Shipment Completion	This phase examines the status of the order header for a *Completed* or *Cancelled* status. If the order is found to be complete or canceled, this phase exits with a *Successful* status. Should this order contain products requiring fulfillment, this phase will wait until the fulfillment process notifies the business project that all lines are fulfilled. This can happen through the Advanced Shipping Notice, Sales Order Status, or Real-Time Status integration points. Once the business project is notified that all lines are fulfilled, this phase exits with a *Successful* status. **Note:** The Workflow rule RO_Check Shipment Completion, which is the event performed by the CHK_SHP_COMPLETE task, runs the Application Engine program RO_SHP_OVR.
Service Order Creation	Installed products created in an earlier phase may need a service order. This phase creates service orders for any installed products that are flagged as Service Order Required on the Product Definition page. The service listed on the Product Definition page is used to create the service orders. This phase is the final phase of the business project, and it does not run until the order is completed or canceled. **Note:** The Workflow rule RO_Create Service Order, which is the event performed by the CREATE_SO task, runs the Application Engine program RO_CREATE_SO.

Reviewing Phases of the Order Maintenance Business Project

Order Maintenance Business Project (CORE_ORD_CHG_BP) Phases

Field or Control	*Description*
Order Email Confirmation	This same phase is used in the Order Capture business project. It provides a current snapshot of the order following order maintenance.

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Field or Control	*Description*
Publish Order Change	If the order is to be fulfilled by an external system, this phase publishes the order maintenance details, if the application message CRM_SALES_ORDER_CHANGE is active. **Note:** The Workflow rule RO EIP Change Pub, which is the event performed by the PUB_CHG_ORDER task, runs the Application Engine program RO_EIP_CHPUB. If your ordering process does not include an integration to a supply chain management system for order fulfillment, refer to the **Publish Order** field description in the *Reviewing Phases of the Order Business Project* section for information on removing this phase from the business project. See Understanding Fulfillment Integration.
Order Changes Complete	This phase examines the status of the order history (RO_HISTORY) by looking for any change history records with *Open* status. If no open history records are found, this phase exits with a successful completion. If the open history records exist, this phase will wait until it is notified that the changes have been processed. The Sales Order Change Notice integration point informs the business project that the requested changes were processed and allows this phase to exit with a *Successful* status. **Note:** The Workflow rule RO_Check Order Changes, which is the event performed by the CHK_ORDCH_COMPL task, runs the Application Engine program RO_ORDCH_OVR.

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Field or Control	*Description*
Installed Product Creation	The order may contain products that require an installed product, as indicated by the Installed Product page in the Product Definition component. For any order lines that were maintained that require installed products, this phase adds, changes, or deletes the installed products as necessary. Maintenance actions involved in adding, creating, or deleting installed products include adding new lines to the order, changing the quantity of existing lines on the order, or canceling lines on the order. In addition, when creating installed products for serialized items, the system creates one installed product for each quantity ordered. For nonserialized items, the system creates a single installed product for the entire quantity ordered on the order line. Installed products inherit values from the order, such as the customer information, site, order ID, and quantity ordered. **Note:** The Workflow rule RO_Create Inst Prod, which is the event performed by the CREATE_IP task, runs the Application Engine program RO_CREATE_IP.
Order Notification	This phase determines the confirmation or rejection of the requested order maintenance by examining the order history (RO_HISTORY). Should notifications be required for the order, as defined in the Order Capture business unit setup, this phase uses correspondence management to create a maintenance confirmation email, and may also create a worklist entry for the customer service representative who entered the most recent order maintenance. **Note:** The Workflow rule RO Order Change Notification, which is the event performed by the ORDER_NOTIFY task, runs the Application Engine program RO_ORD_NOTIF. See Understanding Fulfillment Integration.

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Reviewing Phases of the Quote Business Project

Quote (CORE_QUOTE_BP) Phases

Field or Control	*Description*
Order Email Confirmation	This is the same phase that is used in the Order Capture business project. It provides a current snapshot of the quote.
Publish Order	When using an external fulfillment system, this phase publishes the quote details if the application message CRM_QUOTE is active. **Note:** The Workflow rule RO_EIP Publish, which is the event performed by the PUB_NEW_ORDER task, runs the Application Engine program RO_EIP_PUB. If your ordering process does not include an integration to a supply chain management system for order fulfillment, refer to the **Publish Order** field description in the *Reviewing Phases of the Order Business Project* section for information on removing this phase from the business project. See Understanding Fulfillment Integration.

Related Links

"Monitoring Business Projects" (Automation and Configuration Tools)

Viewing the Order Bridge

This section discusses how to view the Order Bridge.

Page Used to View the Order Bridge

Page Name	*Definition Name*	*Usage*
Fulfillment Page	RO_FULFILLMENT	View detailed order-related events, such as business project instance details.

Related Links

Understanding Business Units

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Fulfillment Page

Use the Fulfillment page (RO_FULFILLMENT) to view detailed order-related events.

Navigation:

- **Orders and Quotes** > **Add Order** > **Order** > **Fulfillment**
- **Orders and Quotes** > **Search Orders and Quotes** > **Order** > **Fulfillment**

Field or Control	*Description*
Business Project	A business project is a structured, workflow-enabled task list. It is used to coordinate and track the work involved in performing tasks. Usually, only one business project exists per order.
Phase	A phase is a group of tasks. Each phase has to be completed before it will transition to next one. A phase is completed when all tasks are completed or failed.
Task	Basic unit of business projects.
Event	An event is any transaction created in the system. It might occur in different components, and is uniquely identified.
Integration Broker	PeopleSoft Integration Broker facilitates synchronous and asynchronous messaging with other PeopleSoft applications and with third-party systems. PeopleSoft Integration Broker uses a variety of communication protocols, while managing message structure, message content, and transport disparities.
Application Engine Process	An Application Engine process is run for automatic tasks. It might create messages, sub-business projects, and transition to next task.
Sub-business project	Sub-business projects are business projects that are incorporated into phases of other business projects.

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Chapter 7

Integrating with Fulfillment and Billing Systems

Understanding Fulfillment Integration

This section discusses:

- Integration setup.
- Integration points.
- Activation of integration points for use with PeopleSoft SCM.
- Order maintenance integration points.

Related Links

Defining Integrations and Mappings
Understanding Business Units

Integration Setup

The primary setup of Order Capture integration occurs in the Order Capture Integration Workbench. The Integration Workbench is designed so that all of your fulfillment and maintenance activity can be configured there. There are also a few fields that must be populated on the Business Unit Definition page.

Integration Points

Order Capture uses integration points to transfer information between itself and an order fulfillment system, such as PeopleSoft Order Management or PeopleSoft Inventory. These integration points enable you to configure your collaborative selling solution to work with any third-party fulfillment system or enterprise application integration (EAI) system.

Note: Delivered integration points are configured for integration with PeopleSoft Supply Chain Management (SCM), which provides corresponding integration points for example, integration points that publish the information for which PeopleSoft CRM listens. Integration with other fulfillment or EAI systems might require the use of the PeopleTools Integration Broker to build the necessary transformation layer on top of the existing integration points that PeopleSoft delivers.

PeopleSoft provides the following integration points to support the order fulfillment process:

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Integration Point	*Description*	*Message / Transaction Name*	*Relationships*	*Type*
Get Autonumber	Requests an ID number (to be used for a new order or quote) from your fulfillment system. This integration point is used only when autonumbering is used for order ID assignment.			Outbound / Synchronous
Get Order Status	Requests current order and order line status from your fulfillment system.	SCM_GET_ORD_STATUS and SCM_ORD_STATUS	ORDER_STATUS	Outbound / Synchronous
Get Product Availability	Requests product availability information from your fulfillment system. **Note:** The Get Product Availability integration point gives PeopleSoft CRM users on-demand access to product availability information. Users click the Check Availability button on the order or quote Entry Form page to initiate the transaction.	SCM_GET_PROD_AVAIL and SCM_PROD_AVAIL	None	Outbound / Synchronous
Publish Order	Sends new orders to your fulfillment system.	CRM_SALES_ORDER and SALES_CRM_ORDER_LOAD	ORDER_PUBLISH	Outbound / Asynchronous
Publish Order Change	Sends changed orders to your fulfillment system.	CRM_SALES_ORDER_CHANGE and SALES_CRM_ORDER_CHANGE_LOAD	ORDER_PUBLISH_CH	Outbound / Synchronous
Publish Quote	Sends new quotes to your fulfillment system.	CRM_QUOTE and SALES_CRM_QUOTE_LOAD	ORDER_PUBLISH	Outbound / Asynchronous
Receive ASN	Listens for ASNs published by your fulfillment system.	ADVANCED_SHIPPING_NOTICE	None	Inbound / Asynchronous

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Integration Point	*Description*	*Message / Transaction Name*	*Relationships*	*Type*
Receive Order Acknowledgement	Listens for order acknowledgements published by your fulfillment system.	SALES_ORDER_ ACKNOWLEDGEMENT	None	Inbound / Asynchronous
Receive Quote Acknowledgement	Listens for quote acknowledgements published by your fulfillment system.	SALES_QUOTE_ NOTICE	None	Inbound / Asynchronous
Receive Order Change Acknowledgement	Listens for order change acknowledgements published by your fulfillment system.	SALES_ORDER_ CHANGE_NOTICE	None	Inbound / Asynchronous
Sales Order Status	Listens for order updates published by your fulfillment system.	SALES_ORDER_ STATUS	None	Inbound / Asynchronous

Note: The integration points listed in the preceding table use PeopleTools Integration Broker messages. Application Message Monitor and Send Primary (a PeopleTools testing utility) help you track and test the messages and transformations that make up these integration points. The Get Autonumber integration point is an exception in that it uses PeopleTools Business Interlink technology.

Activation of Integration Points for Use with PeopleSoft SCM

If you are using PeopleSoft SCM, you need to:

- Activate the product, customer, and business unit integration points.

  These integration points synchronize the customer, product, and business unit data in the two systems. This synchronization is required when you use PeopleSoft SCM as your fulfillment system.

- Activate PeopleSoft CRM services, service operations and routings for the PSFT_EP node.

- Activate the SCM integration points that support the CRM/SCM fulfillment integration.

  The SCM integration points for Product Availability and Get Order Status are XML links rather than Integration Broker transactions; the activation process for those integration points is therefore different.

Note: If a product uses an inventory item, that item must also be in the CRM (Item Primary Table), otherwise the CRM CI Process will fail. Make sure that you sync the item primary first before ProductFullSync or ProductSync.

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Order Maintenance Integration Points

When an order is captured in PeopleSoft CRM, it is passed to the fulfillment system for processing. Subsequent changes to the order are sent from and received by the fulfillment system by means of appropriate integration points. The integration points support integrations with PeopleSoft SCM and other third-party fulfillment systems. The Get Order Status integration point is used as part of the Order Maintenance process when an order is retrieved for maintenance. This ensures that PeopleSoft only allows edits on orders and order lines that are not yet fulfilled.

Note: Order maintenance messages, such as `CRM_SALES_ORDER_CHANGE`, always contain `RO_HEADER` information, and always publish the `RO_INTEGRATION`, `RO_HISTORY`, and `RO_CHARGE` data for the order. The remainder of the `CRM_SALES_ORDER_CHANGE` data only contains order information that has been added or changed.

Order maintenance activities require customer service representatives (CSRs) to have accurate information about changed orders. The following table explains the four integration points that form the backbone of Order Capture's order maintenance activities:

Integration Point Name	*Object Name*	*Description*	*Type*
PUBLISH ORDER CHANGE	SALES_CRM_ORDER_ CHANGE_LOAD	Notifies PeopleSoft SCM of an order maintenance request. It is a transformation of the CRM_SALES_ORDER_ CHANGE message.	Publish
PUBLISH ORDER CHANGE	CRM_SALES_ORDER_ CHANGE	Notifies non PeopleSoft fulfillment systems of the order maintenance request.	Publish
SALES ORDER CHANGE ACKNOWLEDGEMENT	SALES_ORDER_CHANGE_ NOTICE	Notifies Order Capture when changes are processed in SCM.	Subscribe
SALES ORDER STATUS	SALES_ORDER STATUS	Notifies Order Capture of the current state of the order in SCM.	Subscribe

Here is a complete list of the SCM integration points to activate for complete fulfillment functionality:

- SALES_CRM_ORDER_LOAD
- SALES_CRM_QUOTE_LOAD
- ADVANCED_SHIPPING_NOTICE
- SALES_ORDER_ACKNOWLEDGEMENT
- SALES_QUOTE_NOTICE
- SALES_CRM_ORDER_CHANGE_LOAD

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- SALES_ORDER_CHANGE_NOTICE
- SALES_ORDER_STATUS

Activating Integration Points

This section discusses how to activate Integration Broker integration points.

Activating Integration Broker Integration Points

Integration Broker integration points are inactive when delivered. You must activate fulfillment integration points. If you are integrating with PeopleSoft SCM, you must activate the Order Management and Inventory integration points listed in the previous section as well. To activate integration points, activate each of the following elements:

- *PeopleTools Application Messages*:

  You no longer need to activate messages. Messages are created and viewed through PIA. Navigate to **PeopleTools** > **Integration Broker** > **Integration Setup** > **Messages** to view the messages.

- *Integration Broker Service Operations and Routings:* Service Operations are accessed through **PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**. Select the **Active** check box and save the service operation to activate.

  Routings can be either accessed from a tab on the Service Operations page, or directly through **PeopleTools** > **Integration Broker** > **Integration Setup** > **Routings**.

  Select the **Active** check box and save to activate a routing.

You need to set the necessary Queues (called Channel in previous releases) to a **Run** status in order to process integration broker messages. This is accessed through **PeopleTools** > **Integration Broker** > **Integration Setup** > **Queues**. Fulfillment uses queues CRM_ORDER_STATUS, SALES_ORDER_LOAD, SALES_ORDER_ACKNOWLEDGEMENT and SALES_ORDER_STATUS.

Creating Autonumbering for Orders and Quotes

You can choose either the autonumbering or grid option for your orders and quotes. Autonumbers are controlled by business unit. When you set up autonumbering, you choose the business unit that controls autonumber generation and specify whether autonumbers are generated in the PeopleSoft CRM system or in an external fulfillment system.

Choosing a Business Unit to Control Autonumber Generation

When you define an Order Capture business unit, you map it to an Order Management business unit. You can map multiple Order Capture business units to a single order management business unit. Therefore, to ensure a single source for all numbers that are sent to the order management system, CRM uses the order management business unit to drive autonumbering. For example, if order capture business unit A is mapped to order management business unit B, then when you create an order in business unit A, its number is generated based on the rules for business unit B.

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Note: By design, PeopleSoft SCM cannot use CRM as its autonumbering primary for orders and quotes, only for customers, contacts, and products.

Establishing an External ID Source for Orders and Quotes

You can generate order and quote numbers in the CRM system or in your order fulfillment system. If the CRM system does not have an external autonumbering primary for orders and quotes, then order numbers are created locally. In this case, be sure that your autonumbering rules include a CRM-specific prefix so that numbers are unique across both your CRM and order fulfillment system. If your fulfillment system is the autonumbering primary, the Get Autonumber integration point fetches order numbers from the external system as orders are created. Because order numbers in both systems come from a common autonumbering definition, this configuration ensures that order numbers are unique across both systems.

Note: The external ID for an order or a quote in Order Capture is used to identify the order or quote in your fulfillment system. The `RO_INTEGRATION` table stores the external ID data. This table stores the external ID by source code (for example, SCM), thus allowing for multiple external IDs per CRM order. In addition to storing the external order number, we use this table to store a mapping of sequence numbers on header and line notes.
Notes no longer have sequence numbers in CRM, but SCM requires a sequence number to identify a note, which is why we map the information in `RO_INTEGRATION`. In our previous release, `EXTERNAL_ID` was simply a field on the `RO_HEADER` table.

Mapping Line Statuses

When you send an order to your fulfillment system, that system is responsible for tracking status of the order; CRM integration points bring status information into CRM to display the status of an order.

Understanding Line Status Mappings

Because different systems can use different order statuses, you must map your fulfillment system's statuses to Order Capture statuses. The Get Order Status integration point reads the map and converts your fulfillment system's statuses into Order Capture statuses. For line statuses, *Partial* means that if a part of one line is backordered and part is shipped, it is in fact, partially shipped.

Header status mappings may differ slightly. PeopleSoft delivers a map for all the Order Management statuses. If you integrate with a different fulfillment system, modify the map accordingly.

Note: Order Capture maps the status values to node, PSFT_EP, and if you are using a different node name for your Order Management system, you need to enter status mappings against your node name. The node name is read-only once the data is saved.

The following table shows the delivered line status mappings for SCM statuses:

SCM Status	***CRM Status***	***CRM Partial Status***
X (Canceled)	1 (Canceled)	1 (Canceled)

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SCM Status	*CRM Status*	*CRM Partial Status*
Q (Requisitioned)	1000 (Open)	1100 (Partially Open)
U (Purchased)	1000 (Open)	1100 (Partially Open)
B (Backordered)	2000 (Backordered)	2100 (Partially Backordered)
P (Pending)	3000 (Pending)	3100 (Partially Pending)
H (On Hold)	3500 (Fulfillment Hold) **Note:** Holds that originate in PeopleSoft CRM have the status, 9000. This is to differentiate a hold that originated in PeopleSoft CRM (status 9000), from a hold that originated in SCM.	3500 (Fulfillment Hold)
O (In Fulfillment)	4000 (In Fulfillment)	4100 (Partially In Fulfillment)
K (Picked)	5000 (Picked)	5100 (Partially Picked)
C (Closed)	6000 (Shipped)	6100 (Partially Shipped)
S (Shipped)	6000 (Shipped)	6100 (Partially Shipped)

Publishing Order and Quote Messages

When you capture an order or quote in Order Capture, the system instantiates the `CORE_ORDER_BP` or `CORE_QUOTE_BP` business project. Both of these business projects include a task that runs the `RO_EIP_PUB` Application Engine process, which triggers the Publish Order and Publish Quote integration points. These integration points, which consist of the `CRM_SALES_ORDER` and `CRM_SALES_QUOTE` messages, make order and quote information available to your fulfillment system. PeopleSoft delivers the Integration Broker transformation rules required to integrate with SCM; integration with other systems requires additional transformation rules.

If you use Order Management, integration points receive the transformed messages and enter order data into Order Management staging tables. The orders have a source code of *CRM* and start with a status of *Open.*

Note: The instantiation of these business projects is determined by the setID. Some setIDs may run business processes.

Running Batch Jobs in Order Management (PeopleSoft SCM customers only)

Subsequent to order submission, the Order Management fulfillment process starts with the `OMEC` process followed by the `OM_BACKGRND` process; `OM_EC` - OM Electronic Commerce is the process that moves data from the staging tables to the order production tables. `OM_BACKGRND` - Order Completion process completes the defaulting of values onto the order. .In Order Management, you can set up exclusions to choose which subprocesses within `OMBACK` to run or skip based on the order source code. Because orders that originate in CRM already have tax, freight, and pricing information, you should configure `OMBACK` to skip tax, freight, and pricing calculations for orders with the PeopleSoft CRM source code.

There are fours specific SCM processes you need to run to complete the pre-fulfillment tasks. These consist of:

1. Order Validation Process (OM_EC)
2. Order Completion Process (OMBACK)
3. Outbound Acknowledgement (OMEC Outbound)
4. Data Exchange (Data Publish)

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Batch Job	***Description***	***Steps***
1: Order Validation (OMEC)	When you submit an order, the transaction is loaded into order staging tables. We first need to run the Electronic Commerce SQR process (OMEC), which: • Parses data such as customer information and product information to ensure that it is valid. • Sets system defaults and status flags for subsequent processes. • Loads data into the production order tables (order staging data found to have errors is not loaded into the production tables until the errors have been resolved).	To run the OMEC batch job: 1. In the FDM menu, navigate to **Order Management** > **Electronic Commerce** > **Validate Staged Orders/RFQs.** 2. Add a new **Run Control ID.** 3. In the **Processing Options** group box, select the **Inbound Order/ RFQ Activity** check box. **Note:** This will make 2 extra fields (Transaction Type and Integration Point Control ID) available in the **Processing Parameters** group box. 4. Leave the remaining 3 “queue” check boxes in **Processing Options** unchecked. 5. In the **Processing Parameters** group box, choose the specific (Order Management) Business Unit you specified on the Order Capture Definition. 6. Choose the **Transaction Type** of *PO* (Inbound Sales Order). 7. Leave the **Integration Point Control ID** field blank. 8. Click the **RUN** button. This tells the system to process our orders that are sitting in the staging tables. You will automatically be taken to the Process Scheduler Request. 9. Choose the Server Name, *PSNT,* and then click *OK.* You will return to the Electronic Commerce page. 10. Click the **Process Monitor** link and examine the **Run Status** of your job. You are looking to see the status change from *Posting* to *Success*. Click Refresh repeatedly to see if the status has changed.

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Batch Job	*Description*	*Steps*
2. Order Completion (OMBACK)	The Order Completion process (OMBACK): • Performs order pricing, and does tax defaulting and tax calculations. • Processes estimated shipments and external freight calculations.	To run the OMBACK batch job: 1. Navigate to **Order Management** > **Quotes and Orders** > **Process Orders** > **Order Completion** 2. Add a new **Run Control ID.** 3. Select the same Business Unit you chose previously in the **From Business Unit** field. **Note:** The **To Business Unit** field automatically populates with the same Business Unit. 4. In the **From Order Number** and **To Order Number** fields, select the entire range of your pending orders, and then click *Run.* **Note:** You will automatically be taken to the Process Scheduler Request. 5. As with the previous job, choose the **Server Name,** *PSNT,* then click *OK.* . 6. Click the **Process Monitor** link, and examine the **Run Status** of your job. You are looking to see the status change from *Posting* to *Success.* Click **Refresh** repeatedly to see if the status has changed. **Note:** You can now view orders in the PeopleSoft SCM system.

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Batch Job	***Description***	***Steps***
3. Outbound Acknowledgement (OMEC Outbound)	The Outbound Publish process (OMEC Outbound) puts entries in the order acknowledgement queue, which are subsequently used to publish order acknowledgements to PeopleSoft CRM.	To run the OMEC batch job: 1. In the FDM menu, navigate to **Order Management** > **Electronic Commerce** > **Validate Staged Orders/RFQs.** 2. Select the **Run Control ID** you created when you ran OMEC. 3. 3. Uncheck the **Inbound Order/ RFQ Activity** check box, and check the **Acknowledgement Queue.** 4. Click **Run,** and you will go to the Process Scheduler Request. 5. Select the *PSNT* **Server Name,** and click *OK*. 6. Click the **Process Monitor** link on the Electronic Commerce page. 7. Examine the **Run Status** of your job. You are looking to see the status change from *Posting* to *Success.* Click **Refresh** repeatedly to see if the status has changed.

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Batch Job	*Description*	*Steps*
4. Data Exchange (Data Publish)	The Data Exchange job is used to publish the Sales Order Acknowledgement message to PeopleSoft CRM, using the information from the order acknowledgement queue.	To run the Data Publish job: 1. In the FDM menu, navigate to **Data Exchanges** > **Publish Outbound Message.** 2. Select your existing **Run Control ID.** 3. On the Publish Outbound Message screen, there are a variety of check boxes. Select the **Sales Order Acknowledgement** check box. The Sales Order Acknowledgement will change to a link. Click on this link. 4. On the Order Acknowledgement Message Selection Criteria page, first choose your Business Unit and then select *CRM* as the **Source Code.** Leave everything else blank. **Note:** In the **Outbound Messages Selected** group box, *Order Acknowledgement Queue* is pre-selected. 5. Click *OK*. This takes you back to the Publish Outbound Message page. Click *Run.* 6. Enter *PSNT* as the **Server Name,** and click *OK*. Then click on the **Process Monitor** link. If the orders are *In Process,* this means that you have run the entire cycle of SCM batch jobs successfully.

Note: If you navigate to **Order Management** > **Quotes and Orders** > **Create/Update Order** and choose your business unit, you can search for any order and see that a specific order is *In Process*.

Understanding the Transformation Process

PeopleSoft delivers transformation rules that you can use when sending information to Order Management. The Application Engine program that performs the transformation has three stages:

1. It evaluates products and packages that were ordered and transforms order lines as follows:

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a. Standard products are sent exactly as defined in the order line.

b. Product packages are sent as packages, as there is a 1 to 1 mapping of information with Order Management here. However, lightly configured packages are broken into multiple order lines and packages contained in other packages are broken into multiple order lines. Each product included in the package within a package is given its own order line. For example, if Package 1 consists of product A and Package 2, while Package 2 consists of products B and C, then an order line for Package 1 is broken into three order lines: one each for products A, B, and C.

Note: If you use PeopleSoft SCM and you set pricing at the package level (rather than the component level), no pricing details are sent; each component is sent with a price of zero. Therefore, if you are a SCM customer, pricing for dynamic packages needs to be at the component level.

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2. It performs an XSL transformation to structure the integration point data for Order Management.

3. It adds SCM customer information (for example, bill to and ship to addresses) to the order data by looking at the tables (RB_INT_CUSTOMER and RB_INT_CUST_ADS) that map PeopleSoft CRM customer data to SCM customer data. This mapping is maintained by the Customer Sync integration point.

Note: If you use PeopleSoft SCM as your fulfillment system, you must keep customer and product data synchronized in the two systems. The Customer Sync and Product Sync integration points manage this synchronization.

Understanding the Message Content

This section describes certain parts of the order and quote messages published by CRM. For more details about the messages, refer to the integration point catalog and the message definitions. Order and quote messages published by PeopleSoft CRM include:

- *EXTERNAL_ID field from the Integration table RO_INTEGRATION:* This is the ID that maps to the order or quote number in the fulfillment system.
- *Order Management business unit:* This is the business unit that is associated with the Order Capture business unit (on the Order Capture Business Unit Definition page).
- *An order source code of "CRM":* If Order Management is your fulfillment system, this code affects certain processes. For example, Order Management allows CRM orders to be price protected.
- *Order line numbers:* Order Capture expects the fulfillment system to carry the line numbers through the entire fulfillment process. For example, if an order has five lines and lines two, four, and five are sent to Order Management, then the order in Order Management has three order lines numbered 2, 4, and 5. This enables order line tracking even when different order lines are sent to different fulfillment systems.
- *Pricing:* This includes order-level discounts, shipping, and tax information.
- *A price protection setting:* This prevents Order Management from altering price information.
- *Order level discount information.*

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- *Giveaway information:* The ORDER_LINE_TAG field ties a giveaway to a specific order line.
- *Credit card information:* PeopleSoft stores encrypted credit card data, which is what the message sends.
- *Quote messages:* Quotes include additional information specific to quotes, such as the quote due date and expiration date.

Subscribing to Order Status Messages

In PeopleSoft SCM, the Data Exchanges > Publish Outbound Message utility enables you to publish a snapshot of the order as it exists in the SCM system. The Sales Order/Quote Status option enables you to publish orders by business unit, source code (for example, CRM), customer, order type, order number range, order date range, and order change date range. Also, you can choose to publish orders for specific order status values.

Order Capture subscribes to these SALES_ORDER_STATUS messages to provide a method for synchronizing changes made to the order in SCM, so that the order reflects the same information. For example, if an order is maintained in SCM, and a new order line is added, the SALES_ORDER_STATUS message delivers that order and its new line to Order Capture.

Also, as part of the SALES_ORDER_STATUS processing, the current order status is updated, just as the Get Order Status integration point provides.

Getting On-Demand Status Updates

The Get Order Status integration point provides on-demand status updates. Users invoke the update by clicking the Refresh button on the Order Tracking page.

The Get Order Status integration point updates:

- The status for individual order lines.
- The scheduled shipping date and the scheduled arrival dates.

The integration point also updates the RO_LINE_HIST table, which stores a history of line statuses. You can query this history, but it does not appear on any Order Capture pages.

Subscribing to Order and Quote Acknowledgements

In PeopleSoft SCM, the Batch Publish job publishes regular acknowledgments (the SALES_ORDER_ACKNOWLEDGEMENT and SALES_QUOTE_NOTICE messages) and change acknowledgements (the SALES_ORDER_CHANGE_NOTICE message) for orders that come from electronic commerce channels—that is, for orders that are entered into the SCM staging tables.

Note: Change acknowledgements are not published for orders that originate within PeopleSoft Order Management.

In CRM, the Receive Order Acknowledgement and Receive Quote Acknowledgement integration points subscribe to SCM messages, while the Receive Order Change Acknowledgement integration

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point subscribes to the change acknowledgement message. When PeopleSoft CRM receives a change acknowledgement, the order status and change history are updated, while rejected order changes are rolled back. When Order Capture receives a simple order acknowledgement, it updates the order header status to In Process, and it sets the order line statuses to the line status map that you established in the Integration Workbench. When an SCM order line status is set to Open, and this is the status that the acknowledgement message sends, Order Capture maps this to a status of In Fulfillment.

Change History was created with a status of *Open* when order changes were initially submitted. When the change acknowledgement is processed, changes that were accepted by the Fulfillment system are marked Confirmed, and changes that are not accepted are marked Rejected. When a requested change is rejected, the original values on the order are restored back to their values prior to the change. For example, if a quantity on an order line was increased from 1 to 2, and that change is rejected because the order line had shipped, the quantity is restored to 1 following the processing of the change acknowledgement.

Change Acknowledgement updates order statuses just as the Get Order Status integration point does, providing a current snapshot of the order status at the time the Change Acknowledgement was published. Order statuses are set based on the status mapping that you establish. The Change Acknowledgement also creates order notifications based upon the setup for the Order Capture business unit.

Notifications may be specified to go to the customer, the CSR, both, or none, based on the acceptance of the changes that were requested. In addition, when notifications are specified for the CSR, the notification is sent based on the CSR's preferred notification setting as found in the Worker component, which can be email, worklist, or both. Notifications to the customer are sent to the email address of the contact listed on the order, or for a consumer order, the consumer's email address. If there is no email specified for the contact or consumer, notifications cannot be sent to the customer. Email notifications show the changes requested, along with the acceptance status of Confirmed or Rejected, and display the order following the Change Acknowledgement processing. A CSR's Worklist notification is a link to the order in the Order Capture Worklist.

Subscribing to ASNs

PeopleSoft Inventory publishes ASNs that provide the number of items that have shipped for a specific order line. These messages do not contain status information about items that have not shipped.

The Receive ASN integration point subscribes to the ASN message.

When PeopleSoft CRM receives an ASN, it updates statuses using the following logic:

1. The shipped quantity from the ASN is added to any previously recorded quantity shipped.
2. If the total shipped quantity is greater than or equal to the quantity ordered, the line and all items in the line have a status of Shipped.
3. If the total shipped quantity is less than the quantity ordered, the system assumes that the items with the highest status were shipped and adjusts statuses accordingly.

Since status numbers increase as an item moves through the fulfillment process, the unshipped item with the highest status is considered the most likely item to have been shipped.

For example, consider the following status update history for an order line consisting of ten items:

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Time	***Message***	***Status From Message***	***Status Displayed in the Status By Quantity Section of the Order***
10:00 am	Acknowledgement	10 In Fulfillment	10 In Fulfillment
1:00 pm	ASN	5 Shipped	5 Shipped 5 In Fulfillment
2:00 pm	Order status	10 Partially Shipped	10 Partially Shipped
5:00 pm	ASN	3 Shipped	3 Shipped 7 Partially Shipped
8:00 pm	ASN	2 Shipped	5 Shipped 5 Partially Shipped
10:00 pm	ASN	10 Shipped	10 Shipped

At 10:00 am, the order was submitted. An order acknowledgment message caused the system to set the status of all ten items to *In Fulfillment*.

At 1:00 pm, an ASN message indicated that five items had been shipped. Status changes for these five items and the remaining five items keep the status *In Fulfillment.*

At 2:00 pm, the order status message provided one status for all ten items of that order line, which will be displayed in the Line Details section and the Status By Quantity section of the order in the CRM system.

At 5:00 pm, an ASN message indicated that three more items were shipped. The system updates the Status By Quantity section after the receipt of this ASN message: three items with the status of *Shipped* and seven items with the status of *Partially Shipped.* Note that the update only reflects the change in item shipment gathered in this particular ASN message. Access the Package Tracking section of the order to view the total number of items that have been shipped successfully.

At 8:00 pm, an ASN message indicated that two items have shipped. The order will now show us that five have shipped and five are *Partially Shipped* (even though its true that all have shipped, we don't know that unless we look at the package tracking section).

At 10:00 pm, we receive an Order Status message, and it tells us that ten items have shipped, and now the CRM system shows ten *Shipped*.

Note: If an ASN is received for any component of a static package, the entire package is considered to have been shipped. When all products on the order have been marked either *Shipped*, *Complete*, or *Cancelled*, the order header status is set to *Complete*.

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Managing Externally Originating Orders

As mentioned previously, Order Capture uses the `SALES_ORDER_STATUS` integration point to receive order updates from any order-generating systems it integrates with.

If the `SALES_ORDER_STATUS` xml message contains orders that did not originate in Order Capture (for example, EDI orders), then order header information is created in CRM so that these orders are viewable through the Order Capture search screen. When users attempt to drill down for further details, they are transferred to the uniform resource locator (URL) that is specified for the order's source code on the source code workbench for the associated setID. If no URL is specified, then only the order header information is available for review.

On the source code workbench, you can specify different target pages to be used when accessing orders internally using the Orders and Quotes component, or externally via the self service interface. The system marks orders that originate outside of CRM, and if you provide the system with the URL for the external system, then a user who attempts to view such an order in the CRM order tracking pages is automatically redirected to the system where the order originated.

Related Links

Capture Setup Tables - Source Codes Workbench Page

Integrating with Billing Systems

Order Capture integrates with PeopleSoft Transaction Billing Processor to allow access to standard billing functionality such as revenue recognition structure, billing cycle details, and account rules for applying revenue to the General Ledger. It also allows the enterprise to apply surcharges and taxation to billable amounts and process them through user-defined invoice formats.

Setting Up an Integration to PeopleSoft Transaction Billing Processor

This integration is detailed in the“Understanding PeopleSoft CRM Integration with the Transaction Billing Processor” (PeopleSoft Services Foundation) topic.

Using the Transaction Billing Processor Integration from Order Capture

If a contract doesn’t exist, the Order Capture transaction triggers a new contract to be created in the Billing system. Pricing is done by the Enterprise Pricer through Order Capture.

Order Capture only sends transactions that are ready to be billed to the Transaction Billing Processor. Order Capture also sends tax parameters, which are used to retrieve the sales and use tax or VAT rate.

See Also

PeopleSoft Contracts

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Chapter 8

Working with Future Dated Orders

Understanding Future Dated Orders

Future order functionality enables a user to place an order that will occur in the future. The future dated orders are queued in the CRM system and automatically resubmitted to fulfill the order or request. This approach improves performance by not submitting orders until they are due. The functionality of order queuing is set up at the business unit level. You can activate or deactivate the queuing functionality based on your business needs.

Order queuing functionality depends on the order scheduled fulfillment date. An order will be either qualified for immediate execution, that is, the business project will be initiated immediately or will be scheduled for execution in the future. After submitting the order with future scheduled fulfillment date, the system will validate the order and change order status to *Queued*. The business project will not be instantiated; instead the order execution date will be calculated based on the order scheduled fulfillment date and the ordered product's lead time. A separate process (QUEUED_ORDER_SUBMISSION) will run daily to find and submit all outstanding orders scheduled to be executed on current date. One scheduled fulfillment date will be allowed per order.

Note: If an order contains multiple order lines and each associated product has a different lead time, the longest product lead time will be used to calculate the scheduled fulfillment date for that order.

Future Dated Order Terminology

The following terms are applicable to future dated orders:

Term	***Definition***
Future Dated Order	A customer order that will be effective on specified date in the future.
Scheduled Fulfillment Date	The date when future dated order should come into effect. Also known as the *Fulfill By* date field.
Earliest Fulfillment Date	The earliest date when the order can be fulfilled. This is calculated based on the ordered product's lead time. The Scheduled Fulfillment Date must not be before the Earliest Fulfillment Date otherwise the order is placed on hold and may be late.
Queued Order	A submitted and validated future dated order, put in the queue for automatic execution on future date.

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Term	*Definition*
Order Execution Date	The date when a future dated order should be executed to assure that all requested modifications will be effective on the scheduled fulfillment date. This date will be calculated based on Scheduled Fulfillment Date and maximum lead time for a products added to the order (for example, Order Execution Date = Scheduled Fulfillment Date – Maximum Lead Time for products that are added to the order).
Order Execution Time Frame	The period of time between order execution date and order scheduled fulfillment date. On order execution date the business project will be initiated and is assumed to be running until order scheduled fulfillment date.

Setting Up Future Dated Orders

This section discusses how to enable use of future dated orders at business unit level and define lead time for products.

Note: This section discusses page fields that pertain only to future dated order functionality.

Pages Used to Set Up Future Dated Orders

Page Name	*Definition Name*	*Usage*
Order Capture Definition - Internal Page	BUS_UNIT_RO1	Specify whether to support future dated orders.
Product Definition - Definition Page	PROD_DEFN	Define the lead time necessary to fulfill the order for a product.

Enabling Use of Future Dated Orders at Business Unit Level

Use the Order Capture Definition - Internal Page(BUS_UNIT_RO1) to specify whether to support future dated orders by enabling the Allow Future Dated Order option.

Defining Lead Time for Products

Use the “Product Definition - Definition Page” (PeopleSoft Product and Item Management)(PROD_DEFN) to define the lead time necessary to fulfill the order for a product.

If specified, the lead time is used to calculated the scheduled fulfillment date of the order. If no value is specified, zero lead time is assumed.

See Also

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Understanding Future Dated Order Creation.

Creating Future Dated Orders

This section provides an overview of future dated orders and discusses how to create future dated orders and select effective dated addresses.

Note: This section discusses only those fields which are impacted by future dated order functionality. Refer to the following topics for detailed information on all fields found on these pages.

See Understanding Order Capture and Understanding Bulk Order Enablement.

Pages Used to Create Future Dated Orders

Page Name	*Definition Name*	*Usage*
Order - Entry Form Page	RO_FORM	Create an order for future dated product fulfillment. The order is captured immediately, submitted, and queued by the system for future processing.
Address Book Page	RX_ADR_SEL_ADDRESS	View effective dated addresses.

Understanding Future Dated Order Creation

This section discusses:

- Future dated orders.
- Future dated bulk orders.

Future Dated Orders

Future dated order functionality allows you to create orders for product fulfillment in the future.

The **Fulfill By** date field triggers the future dating functionality. On order submit, the order execution date (date when the business project needs to be instantiated) will be calculated based on order scheduled fulfillment date and maximum lead time for products that are affected within the order.

- If the order execution date is in the past, the order will be put on hold. The CSR will be able to override the hold and submit the order taking into consideration the fact that order might be overdue.
- If the order execution date is the current date, the order will be submitted immediately.
- If the order execution date is in the future, the order status will be changed to *Queued* after successful validation, and the order will be scheduled for future execution.

The order will only be submitted if no holds are generated. Once an order is submitted it is queued for fulfillment. At a later date, based on the time to deliver the product and the future date specified:

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- The order configuration will be revalidated.
- The hold validation will be rerun.
- Correspondence will be generated as part of processing the business project to complete the order.
- The order will be processed for fulfillment or activation.

Only one order scheduled fulfillment date is allowed per order. The order line start dates are populated based on the order scheduled fulfillment date (or earliest fulfillment date if scheduled fulfillment date is not set) and are editable based on the Order Capture business unit setting for **Line Dates Editable on Order**. The shipment arrival date is editable, but on order submit the validation is performed to ensure that shipment arrival date is later than order scheduled fulfillment date. If the validation fails the order will be put on hold.

You can select a future dated shipment/billing/site address on the Address Book page. The **Advanced Options** link displays all customer address based on an effective date when the addresses are valid. The **Address(es) effective as of** date defaults to the **Fulfill By** date specified on the order. Upon order submission, the address effective date is validated against the order scheduled fulfillment date to assure there is no mismatch. If the validation fails, the order is put on hold. Possible holds are:

- Fulfill By date is before earliest fulfill by date.
- Future dated orders not enabled.
- Order revalidation after being queued.
- Shipment arrival date earlier than fulfill by date.

A process will be run daily to submit outstanding future dated orders scheduled for the current date. If the order execution date is current or earlier than the current date the order is submitted. The validation will be repeated to ensure the order is still valid. If the validation fails, the order will be put on hold. Otherwise the order status will be changed from *Queued* to *Submitted* and the business project initiates.

The process that is run daily is the Scheduled JobSet named *QUEUED_ORDER_SUBMISSION*. You must activate and schedule this process for the automatic processing of *Queued* orders to occur.

On submission by the Scheduled JobSet, the revalidation process repeats the hold validation that is currently performed on order submits. Additionally all effective dated order parameters will be validated against current date:

- Order contact.
- Shipment addresses.
- Shipment contacts.
- Billing addresses.
- Billing contact.
- Site address.
- Site contact.
- Order line product for active status.

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See Understanding Order Capture.

Future Dated Bulk Orders

You can create a bulk order for future dated product fulfillment. The order is captured immediately; child orders are generated; submitted, and queued by the system for future processing.

Once child orders have been created from the bulk order, the scheduled fulfillment dates of the individual orders may be modified between the time the orders are generated and the time that they are submitted for processing.

The scheduled fulfillment date is copied from the parent bulk order onto each generated child order. If the scheduled fulfillment date is a future date, the child orders will be processed as future dated orders on order submission, and the child order will be queued if necessary.

See Understanding Bulk Order Enablement.

Order - Entry Form Page

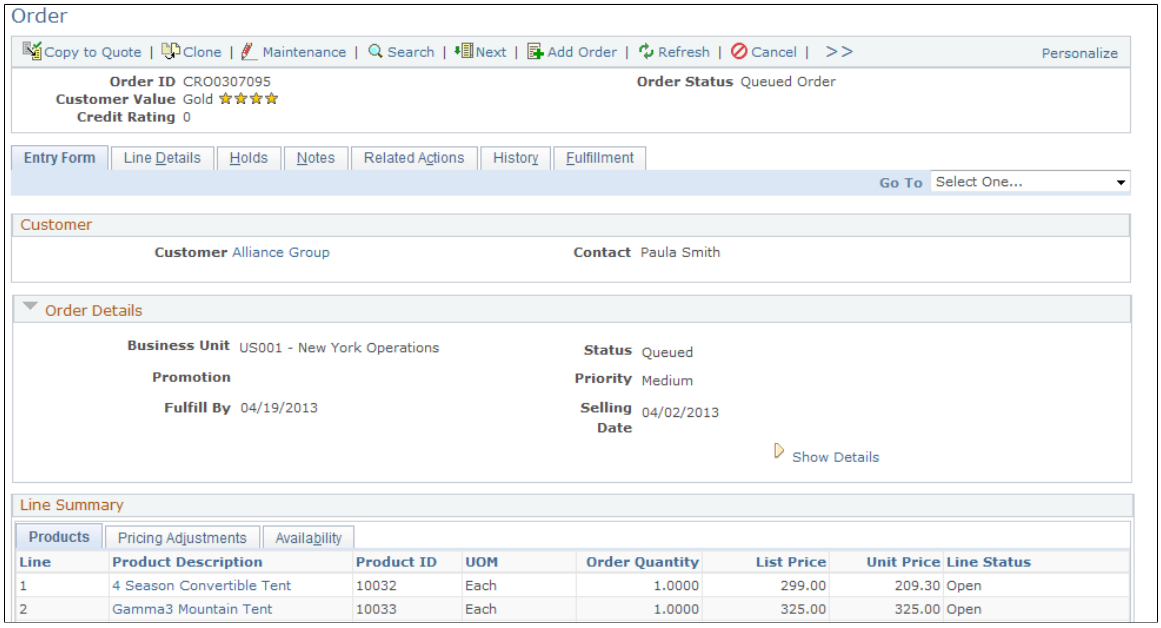
Use the Order - Entry Form page (RO_FORM) to create an order for future dated product fulfillment.

The order is captured immediately, submitted, and queued by the system for future processing.

Navigation:

Orders and Quotes > **Add Order** > **Order - Entry Form**

This example illustrates the fields and controls on the Order - Entry Form page for a queued order.



Field or Control	*Description*
Order Status	Displays a queued status upon submission, if the **Fulfill By** date of the order is a future date.

Field or Control	*Description*
Fulfill By	Displays a date in the future to queue the order for future processing. Prior to order submission, this field is blank by default. This field is not required on save, but it is required on order submit. If you do not explicitly specify this date before order submission, the order is scheduled for immediate execution.
Earliest	Displays the earliest date when the order can be fulfilled. It is based on the products' lead times from the order (current date + product's lead time). If the **Fulfill by** is the current date, the **Earliest** field is not displayed.

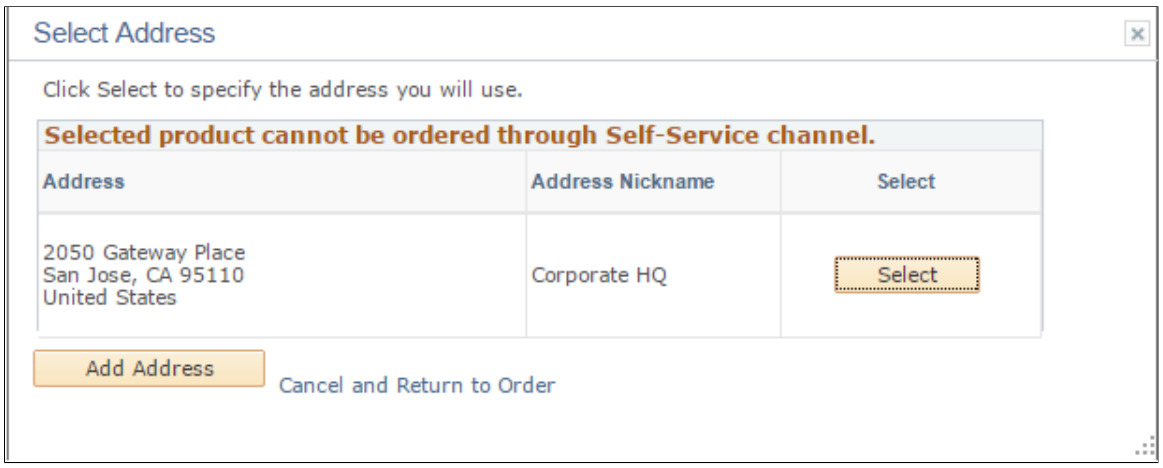
Address Book Page

Use the Address Book page (RX_ADR_SEL_ADDRESS) to view effective dated addresses.

Navigation:

Click the **View Addresses** button on Order - Entry Form page.

This example illustrates the fields and controls on the Address Book page.



Field or Control	*Description*
Address(es) effective as of	The system defaults to the date selected in the **Fulfill By** field. If no date is selected in **Fulfill By** field, the system assume the order will be submitted immediately and does not show the **Address(es) effective as of** field.
Select	Click to use the associated address as the billing or shipping address for the order.

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Field or Control	*Description*
Add Address	Click to create a new address for use (billing, shipping, or both) in the order.

Modifying Future Dated Orders

This section discusses how to modify future dated orders, and view change history for future dated orders.

Note: This section discusses page fields that pertains to future dated order functionality.

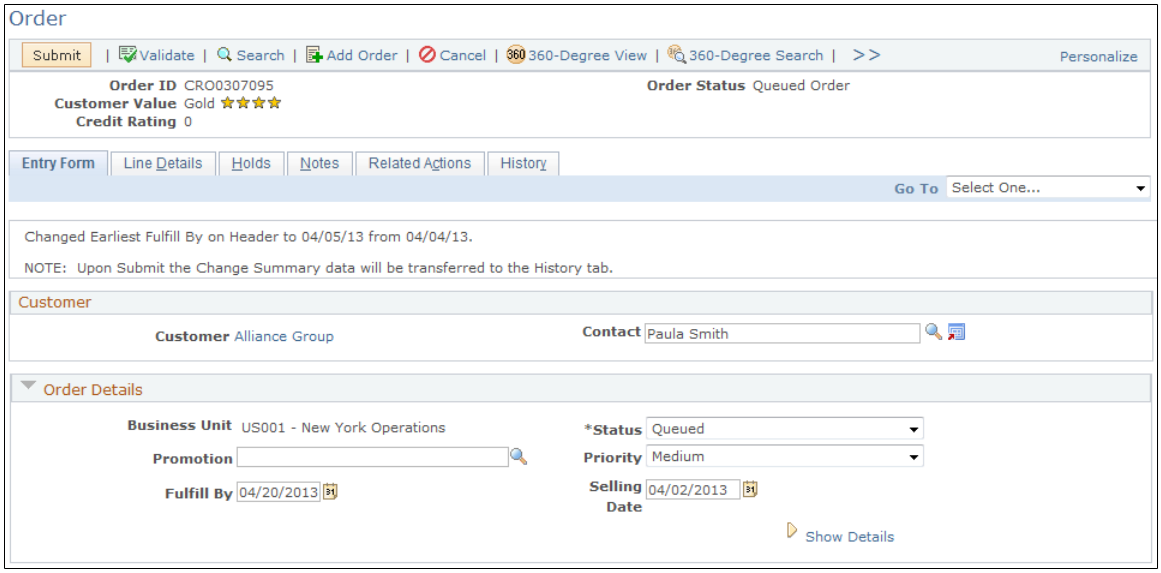
Pages Used to Modify Future Dated Orders

Page Name	*Definition Name*	*Usage*
Order - Entry Form Page	RO_FORM	Access a queued order for order maintenance.
Order - History Page	RO_HISTORY	View the audit trail of all order changes.

Modifying Future Dated Orders

Use the Order - Entry Form Page or Quote - Entry Form Page(RO_FORM) to access a queued order for order maintenance.

This example illustrates the fields and controls on the Order - Entry Form page of a queued order on maintenance mode.



This screenshot shows an example of a queued order that is currently in maintenance mode.

Field or Control	*Description*
Maintenance	Click to switch the order to the maintenance mode, in which all applicable sections become editable. When the order is resubmitted after maintenance is completed, all holds (if identified) need to be resolved before the updates are applied to the queued order. No copy is made of the order like in order maintenance, changes to the queued order are applied directly to the order when all holds are lifted.

Note: When the order is submitted, any changes that were made to the order is logged on the History page.

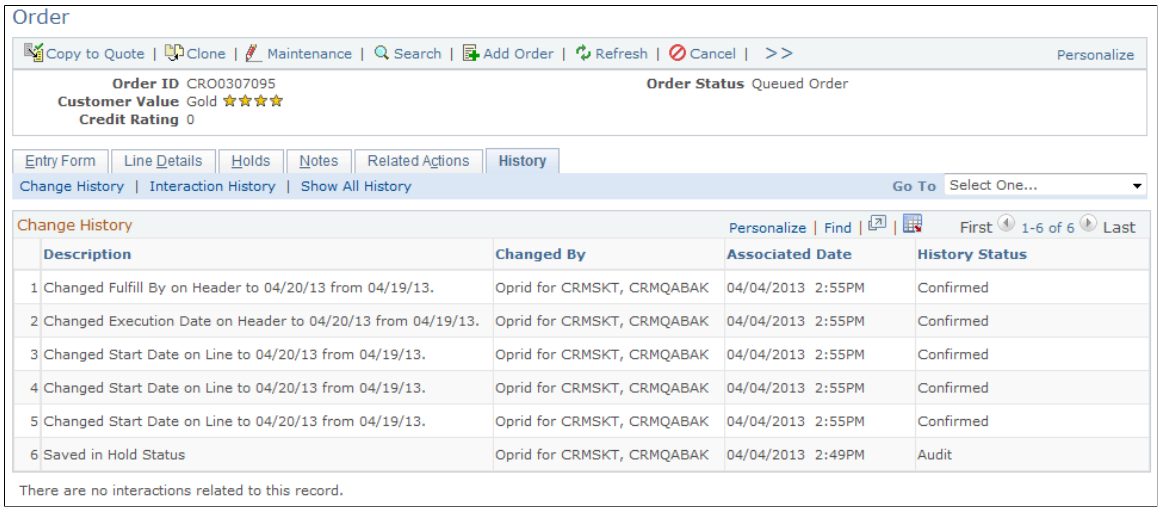
Related Links

Order - Entry Form Page or Quote - Entry Form Page

Viewing Change History for Future Dated Orders

Use the Order - History Page or Quote- History Page(RO_HISTORY) to view the audit trail of all order changes.

This example illustrates the fields and controls on the Order - History page for a queued order.



Related Links

Viewing History

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Chapter 9

Managing Orders and Quotes

Understanding Order Capture

This section lists common elements and discusses:

- Order Capture functionality.
- Hotkeys.
- Order Capture access.
- Delivered User IDs and User Roles.
- Correspondence generation.

Common Elements Used in Managing Orders and Quotes

Functional buttons in the header and footer toolbars and on each Order component page are available to the customer service representative (CSR).

Functional Buttons

The following buttons and links provide one-click functionality for Order Capture:

Term	*Definition*
Submit	Click to save and submit the order or quote for processing.
Save	Click to save the order or quote in its current state.
	Click to validate the quote or order and fire all the hold conditions. Use this button to do hold checking without actually submitting the order.
	This appears if a marketing campaign is associated with the consumer or company that has been identified on the quote or order, and there is an upsell possibility.

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Term	*Definition*
Convert To Bulk	Click to change the current order to a bulk order. Bulk orders are used as a template to create multiple orders. **Note:** The button is only available for orders.
Add Order or Add Quote	Click to initiate a new quote or order.
Search	Click to access the quote and order search page.
Cancel	Click to cancel the current quote or order. The cancel function is only available when edits are allowed. **Note:** This button is not available to engagement services.
	Click to refresh the view for the current page. This also refreshes the view of an *Open* or *In Process* order that is in the fulfillment cycle with a live status update if the integration point is enabled.
Copy to Quote	Click to copy an order to a new quote or convert a quote to an order. The label of this button becomes *Convert to Order* for quotes. This button is available to orders and quotes that have been submitted. **Note:** You cannot convert expired quotes to orders. Only quotes with an expiration date in the future can be converted to an order.
Clone	Click to clone the current order or quote and create a copy of the current instance. **Note:** This button is not available to engagement services.

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Term	*Definition*
Maintenance	Click to switch the order (queued or submitted) to the maintenance mode, in which the entire order is editable again. For quotes, the label of this button becomes *Revise Quote.* This button is available to orders and quotes that have been submitted. **Note:** Maintenance is only allowed during certain circumstances once the order is submitted based on the order processing. Future dated (queued) orders are maintainable.
Correspond	Click to activate print or email correspondence.
360-Degree View	Click to launch the 360-Degree View for the corresponding customer
Personalize	Click to access the Personalize Toolbar page, where you can: • Select which buttons to display. • Organize the order of the buttons. • Select to display or hide the buttons and text.

Display-Only Text in the Header Toolbar

Order Capture displays the following identifiers in the toolbar:

Term	*Definition*
Order ID/Quote ID	Order Capture sequentially generates order and quote IDs based on Automatic Numbering options or by an ID drawn from the Capture Type Workbench setup.
Order/Quote Status	Order Capture delivers many different statuses including: *Open, Pending, Submitted, Hold, Complete, Queued,* or *Canceled.* **Note:** You can add or modify statuses that are applicable to your business process in the Setup Workbench.
Customer	This is a Sold To company or Sold To consumer.

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Term	*Definition*
Customer Value	This is a configurable data element from the Customer Data Model that displays a specific customer demographic. See “Understanding the Company Component” (Business Object Management).
Contact	This is a sold to contact for the company or consumer.
Credit Rating	Displays the customer's credit rating based on what is available in the Customer Data Model.

Related Links

Capture Setup Tables - Header Statuses Workbench Page

Order Capture Functionality

The following graphic identifies the functionality available to the Order Capture CSR:

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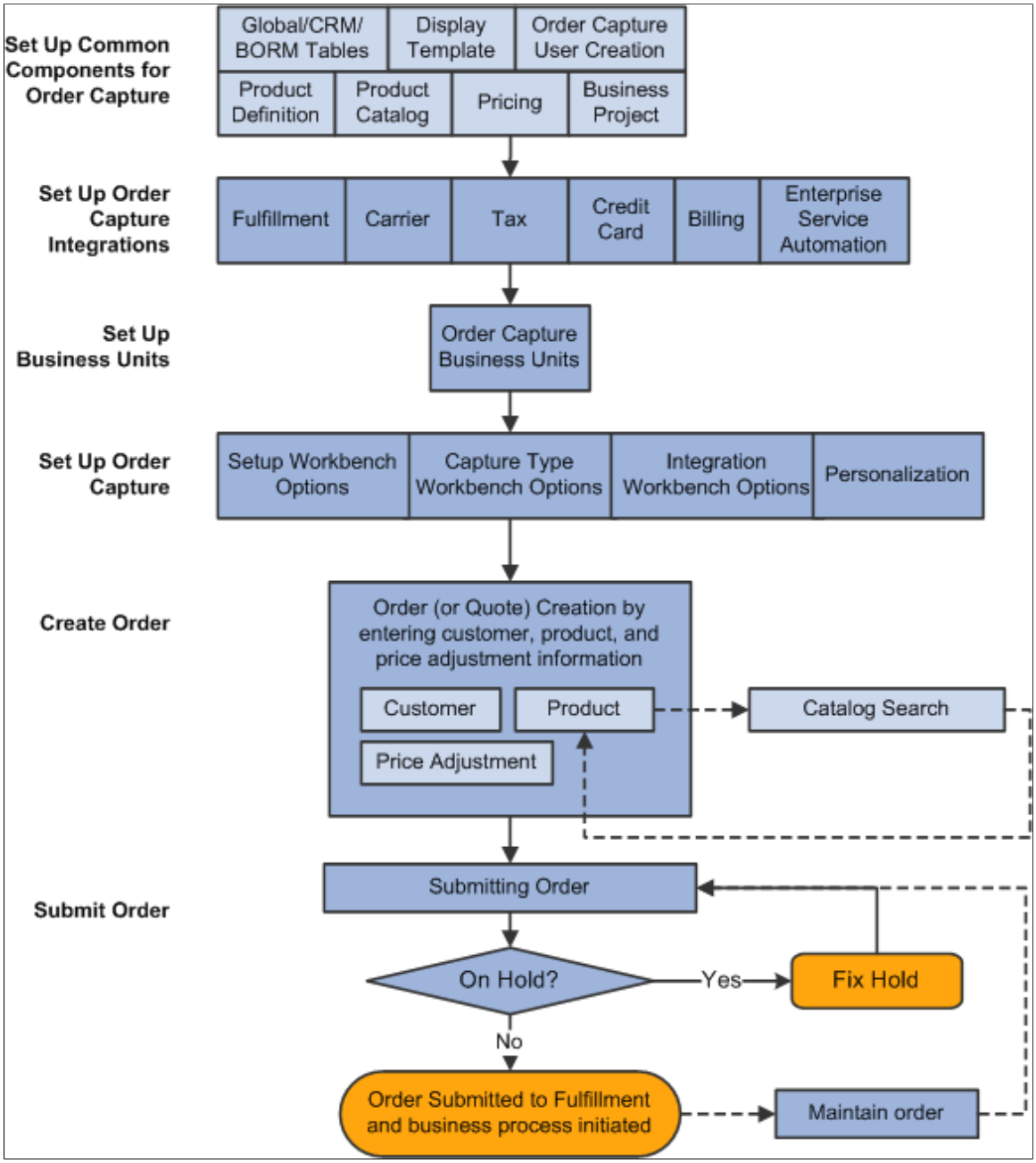
Diagram describing the lifecycle of orders, from creation, submission, to fulfillment.



Order Capture is designed to enable easy order management for the CSR. The Order Capture system seeks to maximize system resources so as to minimize the CSR's energies. For example, Order Capture:

- Delivers pages that facilitate rapid order capture.
- Provides icons, hotkeys, and tab ordering to reduce the number of keystrokes and mouse clicks.
- Limits the number of page refreshes (or server trips) so that there is minimal waiting time, if any.
- Defaults known information whenever possible.
- Utilizes a header toolbar that contains functional icons and pertinent display-only order information.

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- Provides personalization capabilities to the CSR, whereby the CSR or system administrator can define the preferred means of data entry of product information into the order.
- Enables the CSR to easily personalize orders and quotes.

Hotkeys

Order Capture simplifies the order entry process by providing the following hotkeys at the header level and the line level. Use these hotkeys for header level activities:

Hotkey Combination	***Action***
Alt + 1	Save
Alt + 0	Refresh
Alt + U	Upsell
Alt + V	Convert
Alt + C	Clone
Alt + M	Maintain
Alt + A	Add Product
Alt + S	Update Mode

Order Capture Access

You can create or view orders and quotes using various queues.

Direct Navigation

A CSR can access Order Capture directly by selecting *Orders and Quotes* on the left hand navigation of the CRM system. Available options are:

- Add Quote.

  Create a new quote. This option takes you directly to the quote form for quick and direct access.
- Add Order.

  Create an new order. This option takes you directly to the order form for quick and direct access.
- Add Bulk Order.

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Create a bulk order. This option takes you directly to the bulk order form and allows you to select multiple recipients that will receive an order.

- Search Orders and Quotes.

  Search to find an existing order or quote. This option provides direct access to a search component to find an existing order or quote. From there, you can find the orders that you are looking for and access those orders for inquiry or maintenance purposes.

- Find Products.

  Search or browse for a specific product within a specific catalog or across all catalogs.

From PeopleSoft Sales

Sales representatives can navigate to quote or order capture from the Products section of the Leads or Opportunities page in the Sales application. They can specify a product and then navigate directly to the Entry Form within Order Capture. Customer and product information relevant to Order Capture then pre-populates from the lead or opportunity to the corresponding order and quote entry fields.

From the 360-Degree View

You can add orders and add quotes from the Customer 360 Degree View. After selecting the action, the system transfers to the corresponding order or quote entry form along with customer information that was collected in the 360 Degree View.

You can click the **View All** link in the Orders folder or the Quotes folder of the Activities section to view these information of orders or quotes for the selected customer:

- Order ID/Quote ID.
- Order/quote status.
- Date of order/quote creation.

Click the order or quote ID to transfer directly to the corresponding component.

From CTI Integration

In a call center setting where the PeopleSoft CTI Integration is in place, the Order Capture application launches order records on agents' workstations based on order IDs that caller enter into an interactive voice response (IVR) phone system.

See “Understanding CTI” (PeopleSoft Multichannel Applications).

Additional Access

Order Capture functionality is also accessible from:

- PeopleSoft Active Analytics Framework actions.
- PeopleSoft Marketing.

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Delivered User IDs and User Roles

Order Capture delivers the following users and roles:

User ID	*Role Name*	*Role Description*	*Access*
OCADMIN	Order Capture Admin	Administrator	All Order Capture functionality, including the ability to set up Order Capture but not the ability to remove holds.
OCMGR	Order Capture Manager	Manager	All Order Capture functionality, including the ability to remove holds but not the ability to set up Order Capture.
OCREP	Order Capture Rep	CSR (Customer Service Representative)	All Order Capture functionality, except: • The ability to remove holds placed on orders. • The ability set up Order Capture.

You can adopt the users and roles that Order Capture delivers, or modify them to suit your business needs.

Note: To modify permissions for the delivered user roles, navigate to **PeopleTools** > **Security** > **Permissions & Roles** > **Roles**.

Related Links

"Understanding PeopleSoft CRM Security" (Application Fundamentals)

Correspondence Generation

Correspondence can be generated automatically and manually:

- Automatic correspondence is initiated at the point of order or quote submission.
- Manual correspondence is initiated when the **Correspond** toolbar button is clicked.

Upon order or quote submission, Order Capture sends automatic email based on the MCF type setup for order confirmation, quote confirmation and order change. A related object is created for each automatic acknowledgement of a correspondence and is displayed on the Related Actions page for the order or quote. Related actions are not created for manual correspondence.

To create an ad-hoc correspondence, a CSR can click the **Correspond** toolbar button to access the Create Correspondence page where template based correspondence can be prepared to send to pre-populated recipients through different communication channels, either email or print. Order Capture delivers a list of templates that can be used for composing a correspondence.

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You can add attachments to the text message and you can also schedule its exact delivery. After a correspondence is sent, the system automatically creates an interaction on the 360-Degree View for the associated contact.

Note: Before creating a correspondence, make sure that a contact is available on the entry form. The system pre-populates the **Recipients** field of the correspondence request with the contact defined for the order.

This table lists the correspondence templates that the Order Capture application supports (template package usage is set to *Order Capture*):

Template Name	***Channel***	***Description of Action***
Order Maintenance	Email and Print	Emails a text of order maintenance with the order number, customer name, status, order change details, products, billing and shipping information. Prints a PDF, RTF, or Word document version of order maintenance with the same details as in the email.
Order Confirmation	Email and Print	Emails an order confirmation with the order number, customer name, status, products, billing and shipping information. Prints a PDF, RTF, or Word document version of order confirmation with the same details as in the email.
Quote Confirmation	Email and Print	Emails a text of quote confirmation with quote number, customer name, status, products, billing and shipping information. Prints a PDF, RTF, or Word document version of quote confirmation with the same details as in the email.
Order Status	Email	The order inquiry application service in ERMS uses this template to respond to structured email with the status of the order.
Sales Quote Proposal	Email and Print	Emails the quote with an email cover letter, and an attachment of the quote. The quote details contain quote number, expiration date, and product details. Prints a PDF, RTF, or Word document version of the quote, and the quote with the same details as in the email.

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Related Links

Capture Setup Tables - MCF Types Workbench Page
Type Definition - MCF Types Workbench Page
“Understanding Correspondence and Notification Settings” (Automation and Configuration Tools)

Personalizing Order Capture

This section provides an overview of personalization and discusses how to choose order entry form personalizations.

Pages Used to Personalize Order Capture

Page Name	*Definition Name*	*Usage*
Personalizations Page	PSUSERPRSNLCAT	Choose order entry form personalizations.
Option Category: General Options Page	PSUSERSELFPRSNL	Change the default entry form values or restore category defaults. Override any of six defaults used in Order Capture.

Understanding Personalization

You can personalize defaults to make your experience with Order Capture as efficient and as user-friendly as possible. PeopleSoft provides the personalization feature that enables you to change the defaults for the most commonly used functions within Order Capture.

Note: Order Capture also delivers powerful workbench functionality whereby you create application class sets that modify Order Capture settings to best suit your business processes.

Personalizations Page

Use the Personalizations page (PSUSERSELFPRSNL) to choose order entry form personalizations.

Navigation:

My Personalizations > **Personalizations**

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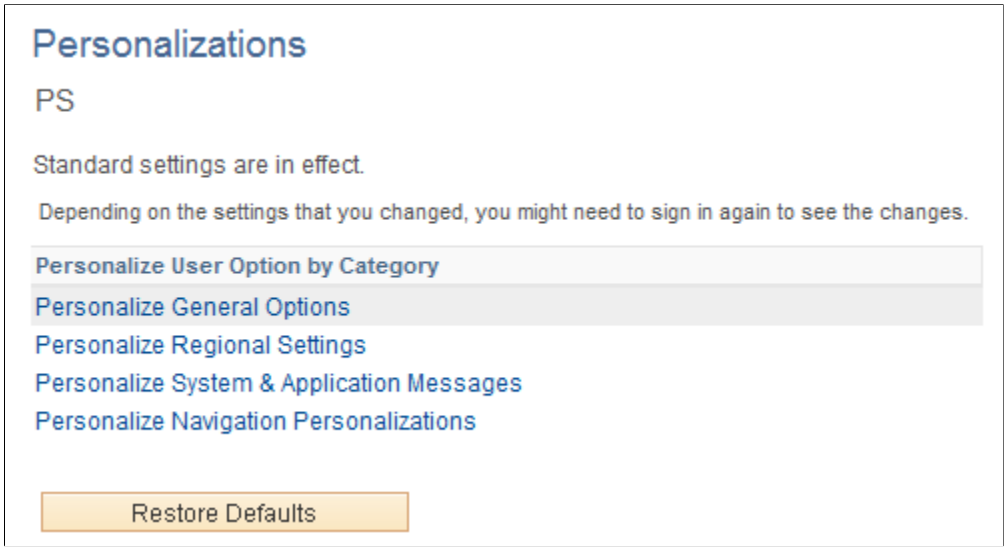
This example illustrates the fields and controls on the Personalizations page.



Field or Control	*Description*
Personalize User Options	Click to access the settings for the personalization category. For Order Capture, relevant settings are in the General Options personalization category.
Restore Defaults	Click to restore default settings for all categories.

Option Category: General Options Page

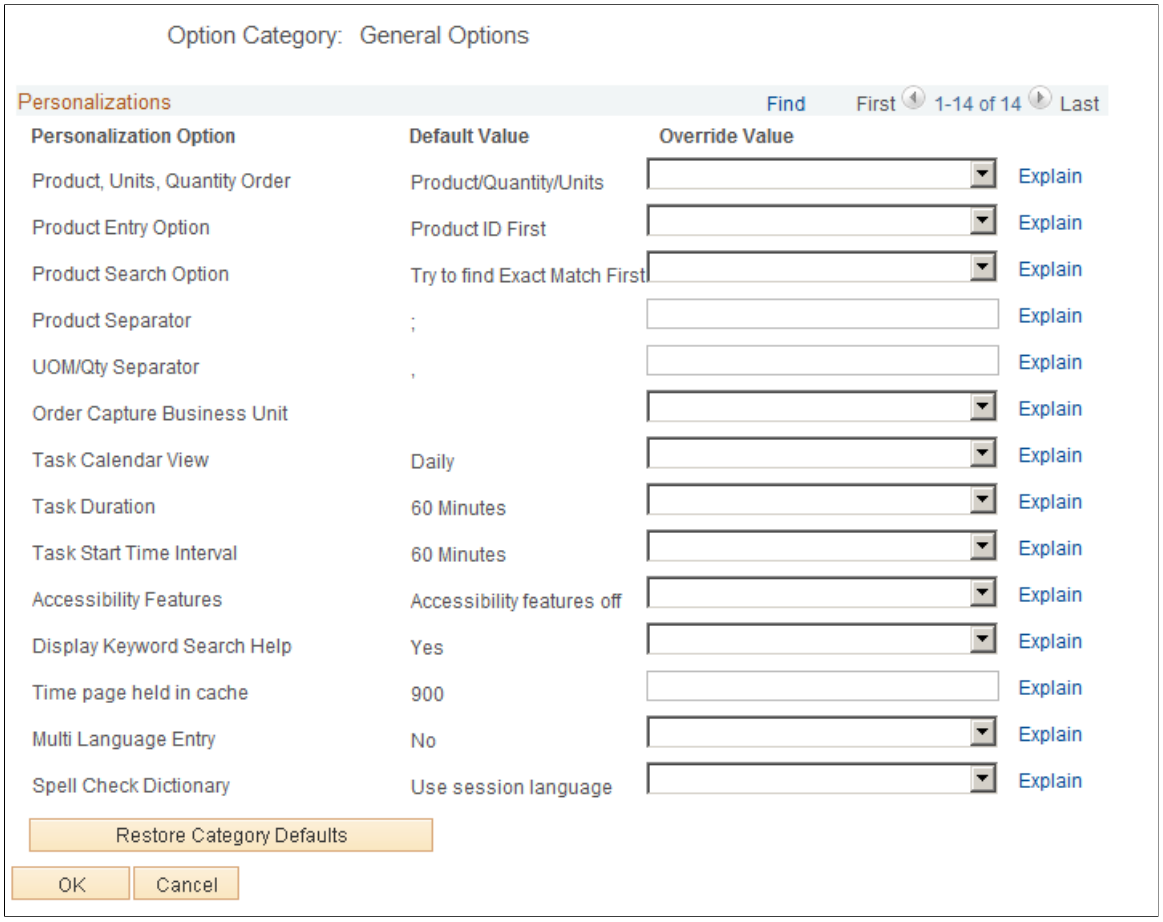
Use the Option Category: General Options page (PSUSERSELFPRSNL) to change the default entry form values or restore category defaults.

Override any of six defaults used in Order Capture.

Navigation:

Click the **Personalize User Options** button for the *General Options* category on the Personalizations page.

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



Personalizations

This section lets you view the default value or override the default value of the available personalization options.

Field or Control	*Description*
Product, Units, Quantity Order	Choose a preferred sequence for using the Add Product(s) functionality on the main Entry Form. This allows you to change how you enter multiple products at one time.
Product Entry Option	Specify whether you want Order Capture to search by *Product Description First* or *Product ID First.* Use this to improve performance by setting the value you normally use to search for products.
Product Search Option	Specify whether you want Order Capture to search by finding an exact match first or to show all possible results. Use this to improve performance.

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Field or Control	*Description*
Product Separator	Identify a product line separator. The Add Product(s) field on the Entry Form has powerful processing functionality contained within it. It allows for the insertion of a special character to divide product lines. For example, you can define this as a colon or semicolon, and then during order entry, you could enter two separate sets of product information. **Note:** PeopleSoft system-delivered data specifies a semicolon.
UOM/Qty Separator (unit of measure/quantity separator)	Identify a UOM/Qty separator. The **Add Product(s)** field on the Entry Form allows for the insertion of a special character to divide information for multiple product lines. For example, you could add two cases of product 10003 by entering *10003:2:cs.* This would then populate an order line with two cases of product 10003, and would save you time. **Note:** PeopleSoft system-delivered data specifies a colon.
Order Capture Business Unit	Specify your default business unit. If you regularly use a particular business unit, then specifying that business unit in this field saves time during order and quote entry.

Configuring Search Criteria

Order Capture searches are quite extensive and enable you to find existing orders or quotes in a variety of ways. You can use multiple search criteria to narrow your search for existing orders or quotes. Once you identify the criteria by which you most often search for orders and quotes, you can personalize the Order Capture search pages and save that personalization. The next time that your search page launches, you will work from the personalized search page that you have created.

Note: If there is more than one result for a search, the results can be distinguished by different criteria, including Customer, Date Created, Status, and Source.

Related Links

"Understanding the Configurable Search" (Automation and Configuration Tools)

Creating Orders or Quotes

This section discusses how to enter orders or quotes and view or modify line details.

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Pages Used to Create Orders or Quotes

Page Name	*Definition Name*	*Usage*
Order - Entry Form Page or Quote - Entry Form Page	RO_FORM	Create a new order or quote by entering order details and adding products to the order lines.
Submit Confirmation Page	RO_SUBMIT_CONFIRM	View a summary of the order or quote.
Order - Line Details Page or Quote - Line Details Page	RO_CAPTURELINE_DTL	Information appears on this page only after a customer and product have been added to the order or quote. View up-sell or cross-sell opportunities, and check product availability. You can edit line details such as unit of measure, order quantity, unit price, and promotion code. You can also allow partial shipment for this product.

Order - Entry Form Page or Quote - Entry Form Page

Use the Order - Entry Form page or Quote - Entry Form page (RO_FORM) to create a new order or quote by entering order details and adding products to the order lines.

Navigation:

- **Orders and Quotes** > **Add Order** > **Order - Entry Form**
- **Orders and Quotes** > **Add Quote** > **Quote - Entry Form**
- **Orders and Quotes** > **Search Orders and Quotes** > **Order - Entry Form**
- **Orders and Quotes** > **Search Orders and Quotes** > **Quote - Entry Form**

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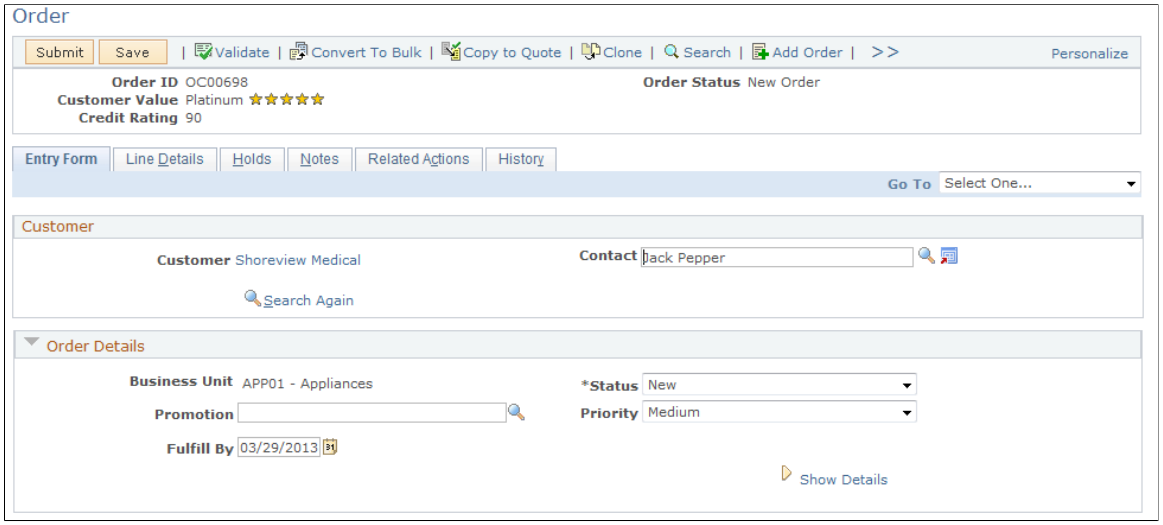
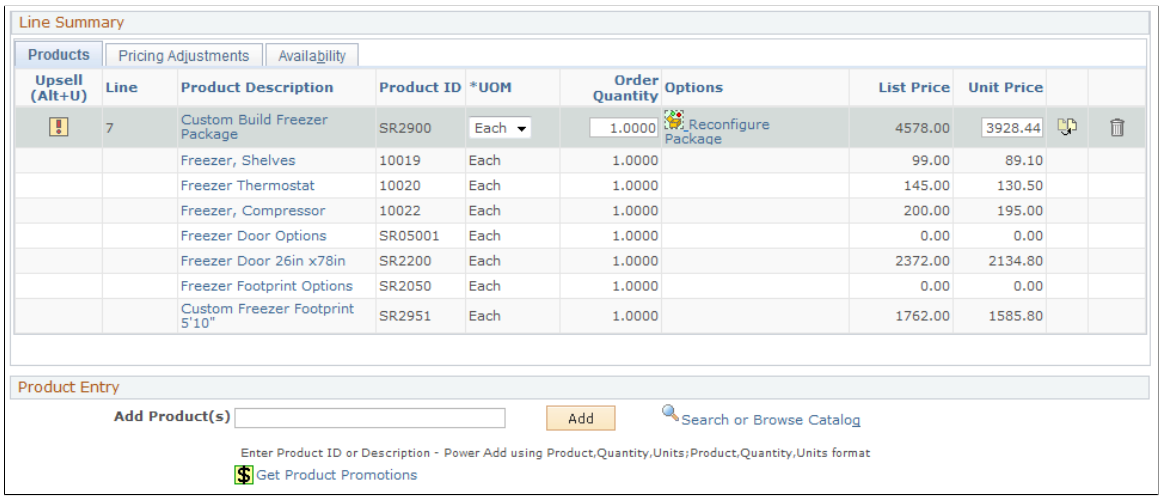
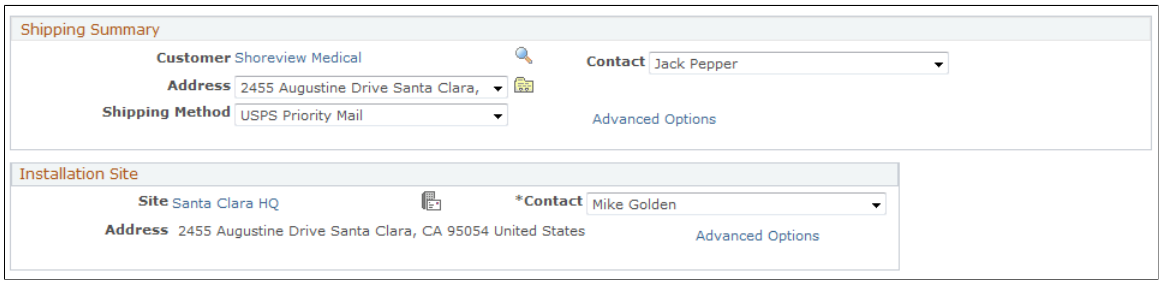
This example illustrates the fields and controls on the Order - Entry Form page (1 of 4).



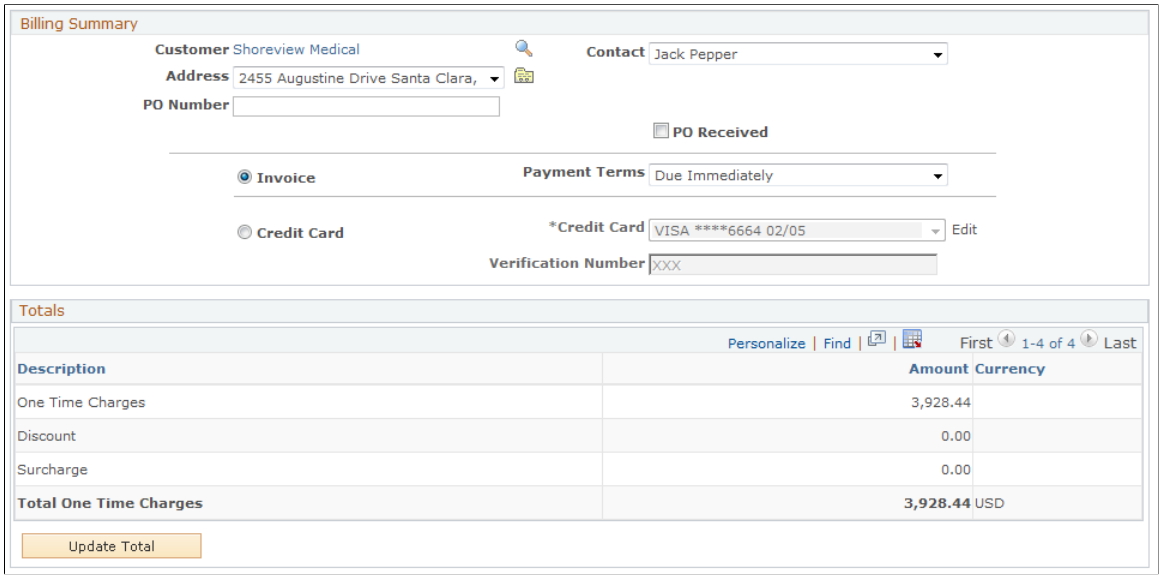
This example illustrates the fields and controls on the Order - Entry Form page (2 of 4).



This example illustrates the fields and controls on the Order - Entry Form page (3 of 4).



This example illustrates the fields and controls on the Order - Entry Form page (4 of 4).



Field or Control	*Description*
Credit Rating	Display-only field that is associated with the customer and defaults from the customer data model.

Customer

When you initially access this page, the **Customer, First Name,** and **Last Name** fields are enterable. After you enter or select a customer, the **Customer** and **Contact** fields appear.

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Field or Control	*Description*

Customer	• Enter the name of the customer.
	• Click to access the Company - Summary page to view information about the customer. Order Capture opens a new window to access the Customer Data Model.
	
	You can create a new customer directly from the Entry Form page using the Quick Create functionality. To create a new customer:
	
	1. Enter a customer name.
	2. Click **Search** to access the Search For Sold To Customer page.
	3. From the **Select Action** field, select one of the following:
	  • *Create Company.*
	  • *Create Company With Contact.*
	  • *Create Company With Site.*
	  • *Create Consumer.*
	  • *Create Consumer With Contact.*
	4. Click **Go** to access the page that you selected.
	5. Populate all fields associated with a customer from on the Quick Create page.
	6. Click **Save** to save the information for the new customer.
	
	See “Understanding Delivered System Data for BO Search and Quick Create” (Business Object Management).

Contact	The primary **Sold To** contact defaults here. You can change the contact to any valid **Sold To** contact associated with this customer for this transaction by selecting from the prompt. **Note:** If the customer is a company, a **Sold To** contact is required. A consumer does not require a **Sold To** contact. Orders or quotes that do not have a contact when one is required are automatically placed on hold.

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Field or Control	*Description*
Search Again	Click to access the Search For Contact Of [company] page to view, select, or add contacts for the company. If you wish to select a new customer and contact, click the **Search Again** link that is available. The current customer information will be erased from the order.

Order Details

This section appears on the Order - Entry Form page and is similar to the Quote Details section on the Quote - Entry Form page. Fields that are discussed in this section are applicable to both orders and quotes.

Note: Some of the fields may not show depending on template settings and additional fields may show based on the template or the product added to the order.

Field or Control	*Description*
Business Unit	Select a business unit to use for this order or quote. Based on the tableset control setup, this field may appear as a read only field with one designated business unit, or a drop-down list box where users can select a business unit from the list for the order or quote. The system locates the default business unit (by taking the Order Capture unit that is specified on the User Preferences page for the user who logged on, or by identifying the default business unit that is specified in the Order Capture Definition component if the former is unavailable). If more than one business unit in the system have their RO_01 (order capture setup tables) record group associated with the same setID as the default business unit, all these business units are then listed in this field. Otherwise, only the default business unit appears in this field and it is not editable. See “Understanding Business Units in PeopleSoft CRM” (Application Fundamentals).

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Field or Control	*Description*
Status	Displays the status of the order or quote. Common statuses are: • *Open:* the order is still being created. • *Submitted:* the order has been submitted. • *On Hold:* there was a problem when the order was submitted. • *In Fulfillment:* the order is being processed. • *Complete:* the order is finished (fulfilled).
Promotion	Select a code that uniquely identifies the promotional offer, if applicable. Products assigned to this promotion will then display a promotional price, rather than their regular price. **Note:** This field involves integration to PeopleSoft Marketing, which relies upon the pricing engine to establish promotional pricing. Under certain circumstances, this field may automatically populate, for instance when an AAF Action that uses a Marketing Wave is used to add a product to the order. See “Understanding Campaigns and Activities” (PeopleSoft Marketing).
Priority	Priorities appear by default from the Order Capture Business Unit. You can change the priority for the order or quote to *Urgent, High, Medium,* or *Low.* **Note:** There is no extra processing logic associated with priorities. Priorities may be changed from the Setup Workbench.

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Field or Control	*Description*
Fulfill By	Enter the date that the order needs to be fulfilled. This field is empty by default and a value is optional as long as the order is not yet submitted. The Fulfill By date will automatically be populated by the order upon submittal. By default, it's the same as the Earliest date that is calculated by the system and it can be updated manually. **Note:** The fulfill by date should not be a past date or a date that is earlier than the date that is specified in the **Earliest** field (if available), otherwise the order will be put on hold. An order is referred to as a future dated order if its fulfill by date is a date in the future. A future dated order would be queued until the date when the order should be fulfilled.
Earliest	Displays the date that the order can be fulfilled at the earliest. This field will appear if any of the products on the order has a defined lead time on its product definition. The system uses this formula to calculate the earliest fulfillment date: Order created date + Product lead time
Show Details or **Hide Details**	Click to view or hide additional details about the order.
Description	Enter a description for the order if needed.
Source	Identify the source of the order or quote as either *CTI, Fax, Phone, Self Service,* or *Supply Chain.* **Note:** Source types may be changed in the Setup Workbench.
Sub Source	Select the sub source of the order to indicate the origin from where the order is created. Available sub source values are based on the selected source. The default value of this field is specified in the definition of the associated order capture business unit. Sub sources are established in the Order Capture Workbench.

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Field or Control	*Description*
Price As Of	(Optional) Enter the order date that Enterprise Pricer will use in the pricing process. If a date is specified as the price as of date, it is used to match the start and end dates of price lists and price rules for retrieving list prices as well as price adjustments.
Created	The system populates the date when the order is created. You can enter a date in the future or in the past.
Currency	Select the currency to use for the order or quote. This defaults based on the business unit.
Total	Indicates the total price of the order as it stands with the currently added products and the discounts applied.

Quote Details

This section appears, replacing the Order Details section, when you access the Quote - Entry Form page. Page elements that appear in both the Quote Details and Order Details sections are described above in the Order Details section.

Order Capture displays these additional page elements for quotes.

Field or Control	*Description*
Due Date	Enter the date due for the quote. Due Date can be used if the customer has requested pricing information by a certain date, or if the quote is part of a request for quote (RFQ) that is due by a certain time. A default date may populate this field if specified during business unit setup.
Expire Date	Enter the expiration date for the quote. A default date may populate this field if specified during business unit setup.
Revision	Displays the total number of times the quote has been revised.
Confidence % (confidence percentage)	Order Capture provides this field so that PeopleSoft Sales can populate its relevant data in the quote. The value amount is transferred from an opportunity if populated on the opportunity.

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Line Summary: Products

This section lists products that are added to the order in individual lines.

In addition to adding new products to or removing them from the order, you can also:

- Update order line information, such as product UOM, order quantity and prices as available.
- Perform options that are available to existing products, such as configuring products and adding attributes.

Additional order line information is available on the Order - Line Details page.

See Order - Line Details Page or Quote - Line Details Page.

After you add a product to the order, additional buttons and options appear as appropriate.

Field or Control	***Description***
	Click to view an up-sell or cross-sell opportunity. The up-sell alert appears on the order line if there is an upsell or cross-sell opportunity associated with the product.
or	Click to transfer to a modal page and configure the product package using Lightly Configurator. If the product package has already been configured, the name of the link is changed to *Reconfigure Package.* See Configuring Products.
(collect attributes)	Click to add product attributes to an order or quote line on a modal page that appears. Always specify the attribute value for products with required attributes. See “Product Definition - Attributes Page” (PeopleSoft Product and Item Management).

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Field or Control	*Description*
List Price	Displays the list price of the product as defined in the matching price list or the Product Price component (if matching price list is unavailable), which is the default option for displaying initial product list prices on orders that is set at the business unit level. It is the base price that the system uses for calculating price adjustments and the total price of the order line. **Note:** Administrators can specify how product list prices are derived and displayed on orders initially at the business unit level. By default, it is set to be handled by the pricing engine, which displays the list price from a matching price list, or the list price from the Product Price component if no matching price list is found.
Unit Price	Displays the net price of the product, which can be the same as the list price, or different from the list price in the case when price adjustments are applied (manually by CSRs or by price rules). Product Unit Price = Product List Price + (applicable price adjustments) This value is modifiable. If you want to override the list price in the order line, specify the new price in the **Unit Price** field.

Line Summary: Pricing Adjustments

Select the Pricing Adjustments tab to enter discounts or surcharges for order lines.

Field or Control	*Description*
Total	Displays the subtotal of the corresponding order line. Total Price = Unit Price x Order Quantity
Discount	Displays, if available, the last available discount amount that has applied to the product list price of the corresponding order line.

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Field or Control	*Description*
Promotion Code	Select a promotion code for the line. If you add a product to the order line using the promotion code, the associated promotion code populates this field. If an activity is direct with an Order Capture integration, the Offer/Promotion Code of the activity will default to both the Order Details Promotion Code and the Line Detail Pricing Adjustment Promotion Code. If you have a promotion code, you must use capture level pricing instead of line level pricing. **Note:** This field differs from the field on the Header only in that you can specify a product promotion for a specific line.
Adjustment	Enter the amount of the adjustment you want to apply to this order line. You can choose to enter either a percentage or an actual currency amount. Select *Percent* or *Amount* in the next field to decide whether the number you enter here will be a percentage of the price, or a static currency adjustment.
Pct/Amt (percent/amount)	Identifies the adjustment field as an exact *Amount* or a *Percentage.*
Adjustment Type	Select whether the price adjustment is a *Discount* or a *Surcharge.*
Apply	Click to apply the discount or surcharge to the order line. The system updates the **Total Price** and **Discount** fields of the order line.
More...	Click to access the Price Adjustments page to view the price adjustments that have been applied to the order line currently (both manual and price rule adjustments). You have the choice to delete pricing adjustments if the order has not been submitted.

See Order - Line Details Page or Quote - Line Details Page.

Line Summary: Availability

Select the Availability tab to check product availability and specify shipment preference.

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Field or Control	*Description*
Availability	Click the **Check Availability** link to conduct a real-time availability check. An integration with the PeopleSoft SCM or a third-party inventory system should be up and running for this link to be operative. If successful, the process returns a numerical count of the remaining number of products in stock for those products that you have selected. If the response fails to return (for example, integration issue or system down, this link is renamed to *Availability Check Failed.* This link is applicable to tangible products.
Partials	Select to allow partial shipment of the order line. This option is applicable to tangible products.

Product Entry

Add products to orders using any of these methods:

- Enter the product ID or description manually and click the Add button.
- Search for the product from catalogs.

Field or Control	*Description*
Add Product(s)	Enter the product ID or a description to search for a product or product package. The system retrieves all the products that you have requested and enters each product on a new line. You can enter more than one product at a time by separating the product IDs or descriptions with semicolons. Be sure to leave no spaces between the IDs or descriptions. This field contains processing logic so that you do not need to enter exact information. Partial matches retrieve the Product Search Results Page, which lists all of the closest matches. **Note:** This field is also equipped with Personalization capability. A CSR's preferences for product selection can be configured so that a variety of input techniques can be used.
Search or Browse Catalog	Click to view catalogs that are associated with this business unit. You can make selections from available catalogs and compare products. You can then add product selections directly to the order form.

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Field or Control	*Description*
Get Product Promotions	Select to access the Products Promotions page to view the promotions that are defined in Marketing for the customer. If the customer only qualifies for one offer, then the order is populated with that offer code. If the customer qualifies for multiple offers, the offer codes are available in a pull-down in the Order so that the user can select the appropriate one.

Shipping Summary

Use this section to enter shipping information.

Clicking the **Advanced Options** link combines the **Shipping Summary** and **Installation Site** sections to become the Advanced Shipping section. CSRs choose to work with the advanced mode of the form typically when there is a need to split shipments, in which case the installation sites would likely to be different for each shipment.

If the **Installation Site** section is not displayed in the basic mode, it'll be hidden in the advanced mode as well.

Field or Control	*Description*
Customer	Displays the customer who the order will be shipped to. Click to access the Company page in the Customer Data Model.
	Click to select a different ship to customer.
Contact	Select a shipping contact for the customer. **Note:** Select *Add/Select More Contacts* to access the Address Book - Select Contact page to select or add a contact. When adding a new contact, you can indicate the new contact as a one-time contact by checking the "One Use Only (not a permanent address or contact)" on the Address Book - Create New Address page.

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Field or Control	*Description*
Address	Select a shipping address for the customer. **Note:** Select *Add/Select More Addresses* or click the **View Addresses** button to access the Address Book - Select Address page to select or add a shipping address. When adding a new address, you can indicate the new address as a one-time address by selecting **One Use Only (not a permanent address or contact)** on the Address Book - Create New Address page.
Shipping Method	Select a carrier service. Applicable carriers that are to be used by the system are set up in CARRIER_TBL. See Setting Up Freight Integration.
Arrival Date	Select the requested arrival date for the product(s) being shipped. If the order is a future dated order, the shipping Arrival Date must be after the Fulfill By date, otherwise the order will go on hold.
Description	Enter any additional information about the shipment.
Tax Exempt Flag	Select if the shipment is exempt from taxes. If selected, Order Capture displays the **Exemption Certificate** field where you select a tax exemption certificate.
	Click to select the site and address or to add a site address. After you select a site, Order Capture displays the site name, which you can then click on to access the Site page in the Customer Data Model. **Note:** Select Site appears only when a product requires one, as defined in the product data model or if the *No Site Hold* option is active. See “Defining Creation and Update Rules for Installed Products” (PeopleSoft Product and Item Management).

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Field or Control	*Description*
Contact	Select a site contact for the customer. **Note:** Select *Add/Select More Contacts* to access the Address Book - Select Contact page to select or add a contact. Contact displays only when a product requires one, as defined in the product data model or if the No Site Hold option is active.
Address	The primary address associated with the site appears here. **Note:** Address displays only when a product requires one, as defined in the product data model or if the No Site Hold option is active. See “How Installed Products Are Created and Updated” (PeopleSoft Product and Item Management).

Lines for this Destination

This section shows all products tied to the shipment. You can split a shipment so that certain lines are:

- Shipped to a different address.
- Shipped using a different shipping method.
- Assigned to a different site.
- Assigned a different requested date.

Note: You cannot split the quantity on a single line into multiple shipments. You must create two lines with the appropriate quantity so that you can specify a unique shipping address, shipping method, and date for each shipment.

Field or Control	*Description*
Split	Select a line to split the order into multiple shipment.
Move to Another Shipment	After you select a line, click to split a line to create multiple shipments.
Combine with Previous Shipment	Click to combine the shipment with the previous shipment. This button appears after you split a shipment
Basic Options or Advanced Options	Click to view or hide details about the shipment.

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Installation Site

This section appears if one of these conditions is met:

- Any product added to this order has the **Site Required** option selected on the Installed Product page of its product definition.
- The *NOSITE* hold is enabled for this capture type (for example, order, or quotet) and business unit combination.

  Hold processing is defined using the Capture Type Workbench. For each setID that is used by the order capture applications, you specify, per capture type, a list of hold validations that the system fires when CSRs submit forms of that capture type. For example, if this hold is enabled for the *SHARE* setID and the *order* capture type, for any order of which its business unit is associated with this setID, the system performs a check and places a hold on the order if a site is missing at time of submission.

  By default, the NOSITE hold is disabled in system delivered setIDs.

Field or Control	***Description***
	Click to select the site and address or to add a site address. After you select a site, Order Capture displays the site name, which you can then click on to access the Site page in the Customer Data Model. **Note:** This icon appears only when a product requires one, as defined in the product data model or if the *No Site Hold* option is active. See “Defining Creation and Update Rules for Installed Products” (PeopleSoft Product and Item Management).
Contact	Select a site contact for the customer. **Note:** Select *Add/Select More Contacts* to access the Address Book - Select Contact page to select or add a contact. Contact displays only when a product requires one, as defined in the product data model or if the No Site Hold option is active.
Address	Displays the primary address associated with the site appears here. **Note:** Address displays only when a product requires one, as defined in the product data model or if the No Site Hold option is active. See “How Installed Products Are Created and Updated” (PeopleSoft Product and Item Management).

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Field or Control	*Description*
Advanced Options	Click to view the **Lines for this Destination** section under the **Advanced Shipping** section. Both the **Shipping Summary** and **Installation Site** (if available) sections are combined and renamed the **Advanced Shipping** section. CSRs choose to work with the advanced mode of the form typically when there is a need to split shipments, in which case the installation sites would likely to be different for each shipment. The **Lines for this Destination** section shows all products tied to the shipment. You can split a shipment so that certain lines are: • Shipped to a different address. • Shipped using a different shipping method. • Assigned to a different site. • Assigned a different requested date. **Note:** You cannot split the quantity on a single line into multiple shipments. You must create two lines with the appropriate quantity so that you can specify a unique shipping address, shipping method, and date for each shipment.

Billing Summary

Use this section to manage payment information.

Field or Control	*Description*
Customer	Displays the customer who the order will be billed to. Click the link to access the Company page in the Customer Data Model to view customer detail.

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Field or Control	*Description*
	Click to select a different bill-to customer, if available. The system displays additional companies that are specified in the **Send Bills To** section of on the Company - Summary: Purchasing Info page. These companies have a *Billed To* relationship with the sold-to customer, which is either the one that appears on the order header, or the one that is currently selected in the **Related Customer** section of the order (in case of a convergent order that can include more than one customer for package migration purposes). See “Purchasing Info Page” (Business Object Management).
Contact	Select a billing contact for the customer. **Note:** Select *Add/Select More Contacts* to access the Address Book - Select Contact page to select or add a contact. When adding a new contact, you can indicate the new contact as a one-time contact by checking the "One Use Only (not a permanent address or contact)" on the Address Book - Create New Address page.
Address	Select a billing address for the customer. **Note:** Select *Add/Select More Addresses* or click the **View Addresses** button to access the Address Book - Select Address page to select or add a billing address. When adding a new address, you can indicate the new address as a one-time address by checking the "One Use Only (not a permanent address or contact)" on the Address Book - Create New Address page.
PO Number (post office number)	Enter the purchase order number, if one exists for the customer.
PO Received (post office received)	Select this check box if a purchase order has been received. **Note:** This functionality is designed solely for auditing purposes. There is no attached business logic.
Invoice	Select this payment option if you want to issue an invoice to the customer.

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Field or Control	*Description*
Payment Terms	Select terms of payment if *Invoice* is selected as the payment method. This field is unavailable for edit if invoice is not the selected payment method.
Credit Card	Select this payment option if you want to charge the customer using a credit card.
Credit Card (drop-down list)	Select an existing credit card from available values or add a new credit card. **Note:** The credit card is attached to the bill to contact or consumer in the customer data model.
Edit	Click to access the Edit Credit Card page (RO_CREDITCARD_SEC) to add new or edit existing credit card information for the customer. **Note:** When you add new or edit existing credit card information, you can select the **Save on File** option to save the information in the Customer Data Model.
Verification Number	Enter the card verification code of the selected credit card (a 3-digit or 4-digit number). After you enter the number for the first time and tab out of this field, the system masks the entered number automatically and displays it in the form of XXX. This field becomes required if the **Credit Card Verification Number Required** option is selected on the General Options page. The system deletes the verification number permanently from the database after the order is submitted and the credit card authorization process is completed (whether passed or failed), or if the order is being canceled. For future dated orders, their verification numbers are stored in the database, and will be removed when the fulfill by date is reached *AND* the orders are submitted.

Totals

Use this section to view and update the order total.

The system computes and displays the order total based on the price order option that is specified at the business unit level. Depending on the average size of orders and the number of orders an organization

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gets for a period of time, administrators can decide the best approach to show updated order pricing without causing negative impact to system performance. For example, for organizations that process large orders (containing over 100 order lines), administrators can choose to update order pricing only when users click the Update Total button, as opposed to when users add new order lines.

Field or Control	*Description*
One Time Charges	Lists the total one-time charges of the order.
Surcharge and **Discount**	Displays the order-level pricing adjustments.
Taxes and **VAT**	Order Capture integrates with Taxware, Vertex, and WorldTax to calculate VAT and other taxes. Make sure that your tax integration options for Order Capture are set up on the Business Unit Definition page and tax provider page prior to using the functionality at runtime. **Note:** To display VAT, you must define World Tax as your Tax Vendor when you created your Order Capture business unit. You can test all of your third-party integrations on the business unit definition page.
Update Total and **Total One Time Charges**	Click to manually invoke the pricing engine and any third-party calculations such as VAT, taxes, and shipping, and update the total amount charged to this order or quote. This is then reflected in **Total One Time Charges.**

Related Links

"Understanding Tax Exempt Certificates" (Business Object Management)
Order Capture Definition - Internal Page

Order - Line Details Page or Quote - Line Details Page

Use the Order - Line Details page or Quote - Line Details page (RO_CAPTURELINE_DTL) to view up-sell or cross-sell opportunities, and check product availability.

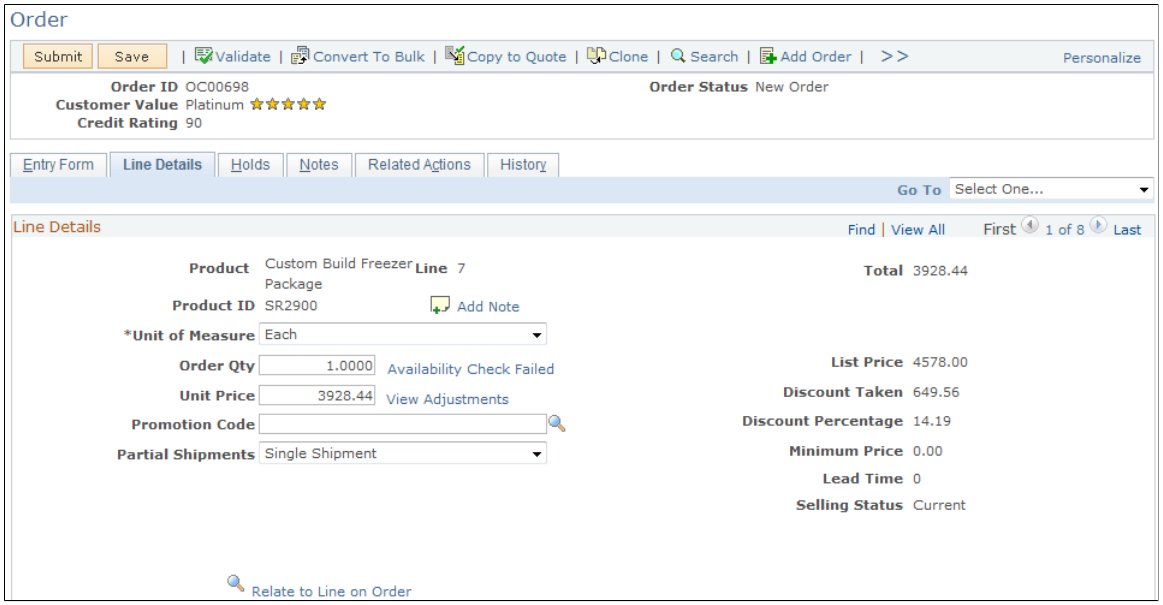
You can edit line details such as unit of measure, order quantity, unit price, and promotion code. You can also allow partial shipment for this product.

Navigation:

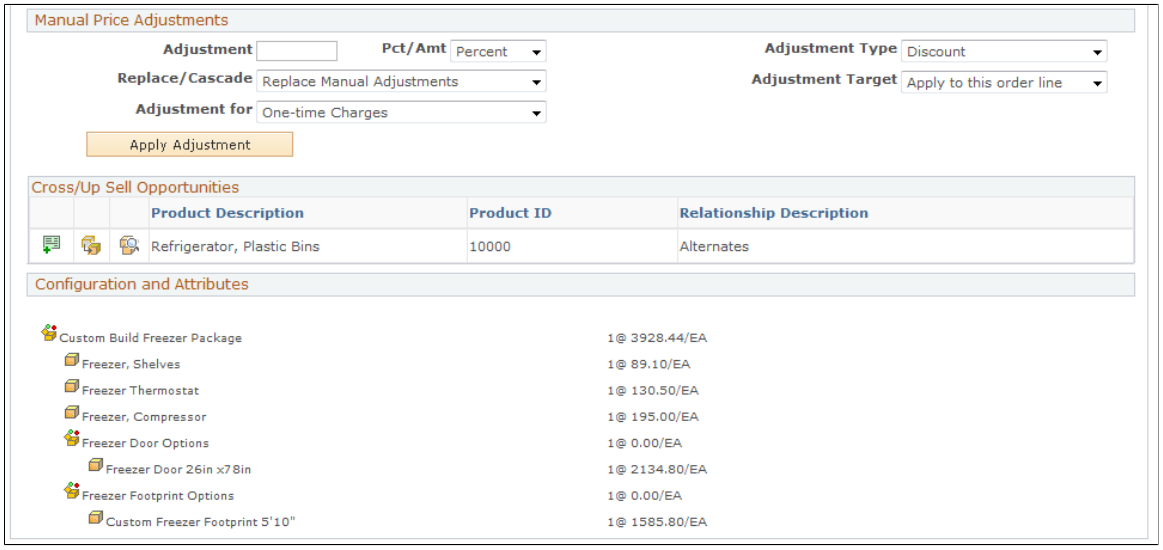
- **Orders and Quotes** > **Add Order** > **Order - Line Details**
- **Orders and Quotes** > **Add Quote** > **Quote - Line Details**
- **Orders and Quotes** > **Search Orders and Quotes** > **Order - Line Details**

- **Orders and Quotes > Search Orders and Quotes > Quote - Line Details**

This example illustrates the fields and controls on the Order - Line Details page (1 of 2).



This example illustrates the fields and controls on the Order - Line Details page (2 of 2).



This page provides detailed information for each product ordered on each order line. Available information includes pricing, cross-sell and up-sell opportunities, configuration setting and attributes and so on. You can apply manual adjustments on the price of the order as well.

Field or Control	***Description***
Add Note (add note)	Click to access the Notes and Attachments page. The cursor is automatically placed on the Summary line so that you can write your note immediately. When a note is attached, the icon becomes dotted.

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Field or Control	*Description*
Unit of Measure	Select the product's unit of measure for use in the order. You can specify the units of measure for products on the Product Unit of Measure component.
Order Qty (order quantity)	Specify the quantity of the product to be ordered.
Availability	Click to return an exact numerical count of the remaining number of products in stock. **Note:** Order Capture uses the SCM_PROD_AVAIL integration point to make a call to PeopleSoft Supply Chain Management to determine product availability. PeopleSoft Supply Chain Management returns an exact numerical count of available products. If you are using a third-party product for order fulfillment, you can use this integration point. It provides the ability to transform the integration point message to the appropriate format using the PeopleTools Integration broker. If the availability check cannot be processed successfully, because the integration is inactive, the system is not responsive and so on, this link is renamed to *Availability Check Failed.*
Unit Price	Displays the new net price of the product in the order line. A unit price is calculated by applying price adjustments to the list price of product. A price adjustment can be: • Automatic, which is performed by the pricing engine in the background when applicable price rules are identified. • Manual, which includes modifying the price value in the field (a manual price override), or applying a discount or surcharge in the **Manual Price Adjustments** section (a manual adjustment).
View Adjustments	Click to access the Price Adjustments page to view any price adjustments that have been applied to the order line and the respective adjustment methods (for example, *manual price override, manual adjustment*, or *Summed Pro-rated Order Adjustments*) as well as the price rules used in the process.
Promotion Code	See Order - Entry Form Page or Quote - Entry Form Page.
Partial Shipments	Select *Single Shipment* not to allow partial shipments. Select *Ship as Items Available* to allow partial shipments.
Total	Displays the one-time price total of the order line, which is the result of multiplying the unit price by the order quantity.

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Field or Control	*Description*
List Price	Displays the product's one-time list price, which is retrieved either from a matching price list or the Product Price component (this is the default option for displaying initial product list prices on orders that is set at the business unit level).
Discount Taken and **Discount Percentage**	Displays the discount (in actual amount and in percentage) that is applied to the one-time price of the specified target (this order line or the entire order), if available. For example, if you apply a $1 discount to a product of list price $25, the value of discount taken is $1.00 and the discount percentage 4 (which stands for 4 percent).
Minimum Price	Displays the product's minimum price as defined on the Product Unit of Measure page.
Lead Time	Displays, if available, the lead time that is defined in the product definition. The system uses this value to calculate the earliest order fulfillment date.

Manual Price Adjustments

Validation checks are in place to make sure that total discounts or surcharges imposed on orders are within limits. Functional options are set up to limit the amount of discounts and surcharges that functional group users can apply. So when an order capture user (a customer support representative or an administrator who is also a functional group user) places an order with price adjustment, the system retrieves the maximum surcharge and discount amount allowed and compares the values with the pending surcharges and discounts. The order is put on hold if the pending amount exceeds the hold limit permitted to the user.

Field or Control	*Description*
Adjustment	Enter the amount of the adjustment you want to apply to this order line. You can choose to enter either a percentage discount or an actual currency discount. Select *Percent* or *Amount* in the **Pct/Amt** field to decide whether the number you enter here will be a percentage of the price, or a static currency adjustment.
Pct/Amt (percent/amount)	Identifies the adjustment field as an exact *Amount* or a *Percentage.*

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Field or Control	*Description*
Replace/Cascade	*Cascade Manual Adjustment* adds this price adjustment to all existing adjustments, whereas *Replace Manual Adjustments* replaces any manual adjustments with the current discount being applied.
Adjustment for	Displays *One-time Charges*, which is the default charge type to which the manual adjustment applies.
Adjustment Type	Select *Discount* or *Surcharge.*
Adjustment Target	You can target the discount for the current line that you are looking at, in which case you select *Apply to this order line,* or you can apply the discount to the whole order, by choosing *Apply to entire order.*
Apply Adjustment	Click to apply the manual price adjustment to the order line. The system updates values of the **Total Price**, **Unit Price** and **Discount** fields accordingly.

Cross/Up Sell Opportunities

This section lists the product definitions that are associated with the ordered product in the Product Relationship component.

Field or Control	*Description*
	Click to add the corresponding product to the order.
	Click to replace the ordered product of this line detail with the product corresponding to this icon.
	Click to view the comparison between the ordered product of this line detail and the product corresponding to this icon.

Configuration and Attributes

This section provides a detailed list of the options selected for the configured product. Configuration details appear in a list with corresponding product name, description and price. Attributes that are captured during the product configuration session also appear in this section.

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Note: If a product is defined in the product data model as requiring configurable attributes, the **Collect Attributes** link appears when the product is added. You can also view the attribute and attribute values that are captured using this link for the product.

Configuring Products

This section discusses how to configure products using Lightly Configurator.

Page Used to Configure Products

Page Name	*Definition Name*	*Usage*
<Configure Product> Page	CP_DYNAMIC_PANEL	Create a dynamic package from within Order Capture.

<Configure Product> Page

Use the <Configure Product> page (CP_DYNAMIC_PANEL) to create a dynamic package from within Order Capture.

Navigation:

- **Orders and Quotes** > **Add Order** > **Order - Entry Form**

  Click the **Configure Package** link next to a package product on the Order - Entry Form: Products page.

- **Orders and Quotes** > **Add Quote** > **Quote - Entry Form**

  Click the **Configure Package** link of a package product on the Quote - Entry Form: Products page.

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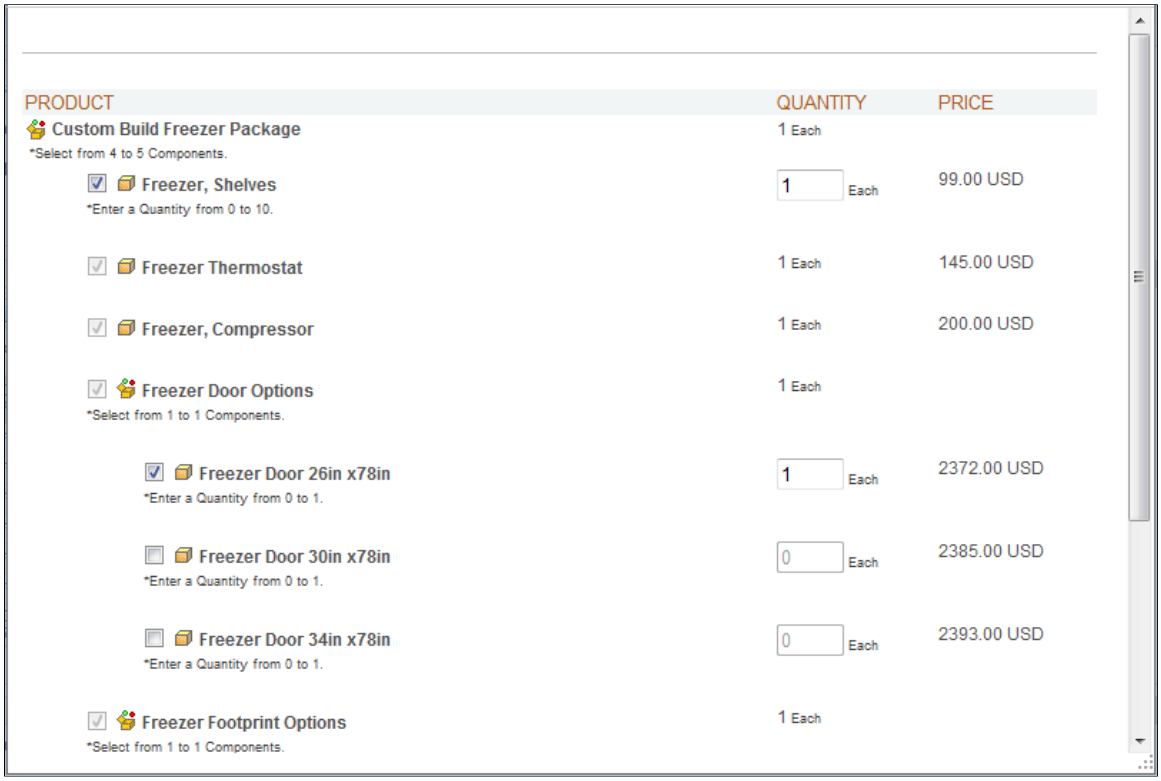
This example illustrates the fields and controls on the <Configure Product> page.



Configured product packages are established using these components: Product Definition and Package Components.

In a package component definition, you specify the maximum and minimum number of optional or required components that a customer can select, and specify (for each component) the maximum and minimum quantity that a customer can order.

Related Links

“Product Definition - Definition Page” (PeopleSoft Product and Item Management)

“Package Components Page” (PeopleSoft Product and Item Management)

Viewing Price Adjustments

This section discusses how to view price adjustment details.

Page Used to View Price Adjustments

Page Name	*Definition Name*	*Usage*
Price Adjustments Page	RO_CAPTURELINE_ADJ	View details of the price changes that you made. You can view the pricing details for Line Adjustments, Summed and Manual Adjustments, and Order Adjustments.

Price Adjustments Page

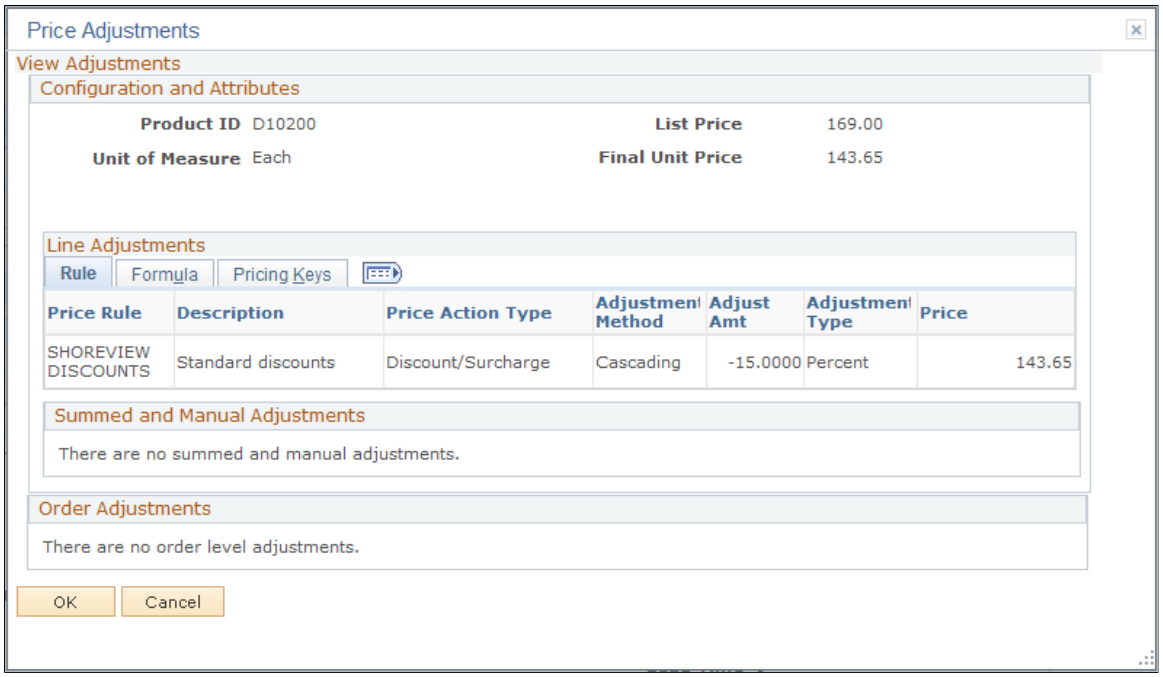
Use the Price Adjustments page (RO_CAPTURELINE_ADJ) to view details of the price changes that you made.

You can view the pricing details for Line Adjustments, Summed and Manual Adjustments, and Order Adjustments.

Navigation:

Click the **View Adjustments** link on the Order - Line Details page or Quote - Line Details page.

This example illustrates the fields and controls on the Price Adjustments page showing price adjustments (manual) on one-time prices.



Configuration and Attributes

This section displays the basic information of the product that is associated with the order line currently being viewed. In addition to the product ID and unit of measure, it shows the product's list price as well as the final net price after pricing adjustments are applied.

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Note that only line level adjustments, not order level adjustments, are reflected in the final unit price in this section.

Line Adjustments - Rule Tab

This grid displays all of the adjustments applied by the system, including the price rules that are being applied to the lines.

Field or Control	*Description*
Price	Displays the net one-time price if the corresponding price rule applies to one-time price..

For adjustments that are summed, the price is displayed as zero and the summed value is displayed in the **Summed and Manual Adjustments** section.

Line Adjustments - Formula Tab

Information on this tab provides more detail about the rules that are being applied.

Line Adjustments - Pricing Keys Tab

Information on this tab lists the identifiers which indicate where the Price Rule condition was met.

Summed and Manual Adjustments

This grid displays the summed and manual adjustments that were applied to the order line. It is a manual adjustment if a percentage or an amount of discount or surcharge is applied to the list price. It is a price override if the net price is being updated in the field directly.

Order Adjustments

This grid displays the one-time price adjustments that have been applied for the total order.

Adding and Viewing Notes and Attachments

This section discusses how to add or view notes and attachments.

Page Used to Add or View Notes and Attachments

Page Name	*Definition Name*	*Usage*
Order - Notes Page or Quote - Notes Page	RO_NOTE	Add or review notes or attachments for the order or quote.

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Related Links

"Understanding Notes and Attachments" (Application Fundamentals)

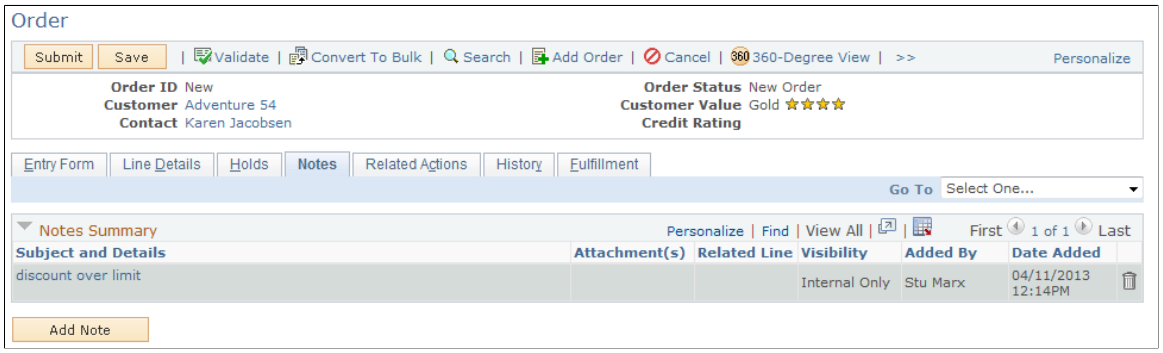
Order - Notes Page or Quote - Notes Page

Use the Order - Notes page (RO_NOTE) to add or review notes or attachments for the order or quote.

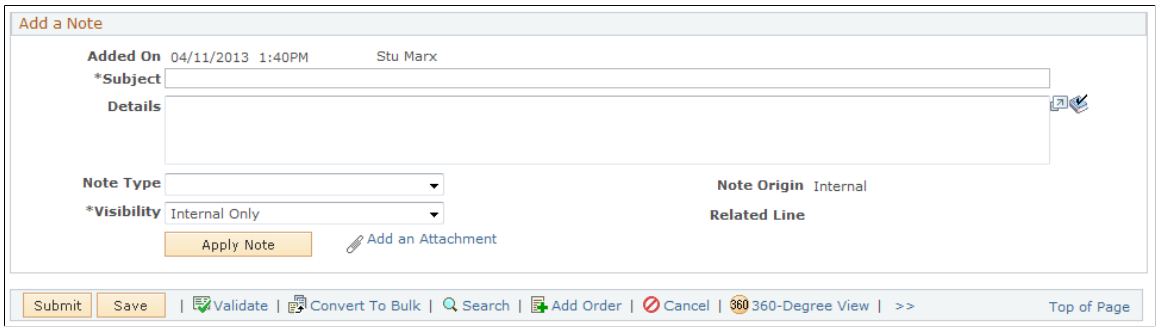
Navigation:

- **Orders and Quotes** > **Add Order** > **Order - Notes**
- **Orders and Quotes** > **Add Quote** > **Quote - Notes**
- **Orders and Quotes** > **Search Orders and Quotes** > **Order - Notes**
- **Orders and Quotes** > **Search Orders and Quotes** > **Quote - Notes**

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



This example illustrates the fields and controls on the Order - Notes page (2 of 2).



Notes Summary

This section displays a summary of notes.

Field or Control	*Description*
Subject and Details	Displays a short and long description of the note contents.

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Field or Control	*Description*
Add Note	Click to add a note for the order. This button is not available when the order has been submitted.

Add a Note or Note Details

Field or Control	*Description*
Note Type	Select either *Billing Notes*, *Comment*, *Customer Call*, *Customer Web*, *Pricing Note*, *Production Configuration*, *Research*, *Sales Note* or *Shipping Notes* as the type of note.
Visibility	Select *Everywhere* or *Internal Only*. If you select *Everywhere*, users of all self service applications, including Order Capture Self Service will be able to view the note. If you select *Internal Only*, notes will only be viewable to the CSR.

Attachments

Field or Control	*Description*
Attachment	Click to view an existing attachment.
Apply Note	After entering information, click to apply the note to the order or order line or to the quote or quote line.
Add an Attachment	Click to add an attachment. Order Capture opens a new page for you to browse the network to locate and attach a file to the note.

Managing Holds

This section provides an overview of holds and discusses how to view the hold summary.

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Page Used to Manage Holds

Page Name	*Definition Name*	*Usage*
Order - Holds Page or Quote - Holds Page	RO_HOLD	View holds on the order or quote.

Understanding Holds

Hold validations fire automatically as soon as you submit an order or quote. When an order or quote needs to be put on hold, the Holds page is displayed with the list of hold items that apply. The status of the order or quote changes to *Hold Order* and the submission cannot continue unless all holds are lifted. There are a variety of reasons as to why your order or quote will be placed on hold. There are also several ways in which you can resolve the problem.

These are some of the hold codes that are delivered in Order Capture:

Hold Code	*Explanation*
Anonymous Customer Hold	Hold is triggered if the customer specified is setup as an anonymous Business Object. Use this hold when the fulfillment system does not support anonymous Customers.
Configuration Hold	Hold is triggered if a line has a configured product and it is not configured when capture is submitted.
Exceed Corporate Credit Limit	Hold is triggered if the customer has exceeded the credit limit range as specified on the Customer and Business Unit.
Credit Card Hold	Hold is triggered if the customer is paying by credit card, and the authorization fails.
Currency Conversion Not Possible	Hold is triggered if there is no currency conversion available for the pricing engine.
Exceeds Maximum Order Qty	Hold is triggered if the quantity on the line exceeds the maximum order quantity.
Under Minimum Quantity	Hold is triggered if the quantity on the line falls below the minimum order quantity.
Below Minimum Selling Price	Hold is triggered if the quantity on the line falls below the minimum selling price.
No Bill To Contact	Hold is triggered if the bill to contact is missing.
No Bill To Customer	Hold is triggered if the bill to customer is missing.

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Hold Code	***Explanation***
No Product Package Components	Hold is triggered if the line has a product that is a package, and no package components have been chosen.
No Capture Lines	Hold is triggered if the order or quote has no lines.
No Ship To Customer	Hold is triggered if the ship to customer is missing.
No Ship To Contact	Hold is triggered if the ship to contact is missing.
No Sold To Contact	Hold is triggered if the sold to contact is missing.
Product Catalog Violation	Hold is triggered if the product on the line is not in the customer's catalog.
Product Increment Violation	Hold is triggered if the line quantity is not a multiple of the increment defined on the product definition.
Product Prerequisite Violation	Hold is triggered if the product on the line has prerequisites that are not installed, or not on the current capture.
Price List Not Found	Hold is triggered if there is no price list found by the pricing engine.
Line Site Contact Required	Hold is triggered if a product requires a site, and a Site Contact is not one specified.
Line Site Required	Hold is triggered if a product requires a site, and there is not one specified.
Freight Calculation Hold	Hold is triggered if the calculation of freight charges by the third-party system fails.
Future Dated Orders not enabled Hold	Hold is triggered if a Fulfill By date is set and Future Dated Orders are not enabled on the Business Unit.
Order Re-Validation Failed	Hold is triggered if order fails revalidation on order execution date during the submit attempt. This may occur if the products on the order are no longer active.
Fulfill By date is before Earliest Fulfill By date	Hold is triggered if the order execution date is before the earliest date the order can be fulfilled. The Earliest Fulfill By date calculated based on the Lead times of the products on the order.
Shipment Arrival Date Earlier then Order Due Date	Hold is triggered if user specified the shipment arrival date prior to the order due date. The shipment may arrive late.

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Hold Code	*Explanation*
Order Execution Time Frames Overlapping	Hold is triggered if the estimated order execution time frame (the period of time between order execution and order due dates) is overlapping with the same period for another already queued order.
Discount percent over limit (for one-time charge)	Hold is triggered if the total discount on the one-time price of a product is more than what the agent can apply. This hold code is applicable only to any discounts applied by price rules. **Note:** A separate hold code is available to limiting the maximum total discount on the one-time price of a product that the agent can apply manually, not through price rules.
Price Surcharge Limit Reached (for one-time charge)	Hold is triggered when the surcharge percent on the one-time price of a product is more than what the user is allowed to apply.

Note: Holds can be easily added for specific business processing. You can extend hold processing by creating your own hold codes. This is a simple configuration task in the Order Capture Setup and Capture Type workbenches.

See Capture Setup Tables - Hold Codes Workbench Page.

See Type Definition - Hold Processing Workbench Page.

Order - Holds Page or Quote - Holds Page

Use the Order - Holds page or Quote - Holds page (RO_HOLD) to view holds on the order or quote.

Navigation:

- **Orders and Quotes** > **Add Quote** > **Order - Holds**
- **Orders and Quotes** > **Add Order** > **Quote - Holds**
- **Orders and Quotes** > **Search Orders and Quotes** > **Order - Holds**
- **Orders and Quotes** > **Search Orders and Quotes** > **Quote - Holds**

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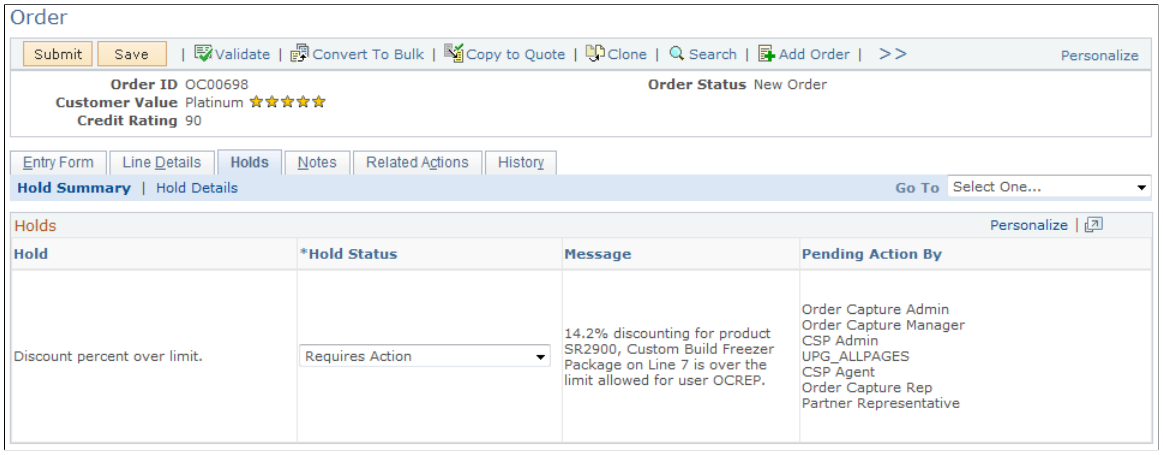
This example illustrates the fields and controls on the Order - Holds page.



Hold Summary tab

Field or Control	*Description*
Hold	Displays the description of the hold code.
Hold Status	Displays the hold status. You can change the hold status if your user security allows you to override it. If you select *Override Hold* you can add a note to explain why the hold was overridden.
Message	Displays the explanation of the hold.
Pending Action By	List PeopleSoft roles that can override a specific hold code.

Hold Details tab

Field or Control	*Description*
Hold	Short explanation of the reason for the hold.
Related Line	Line number for the offending product(s).

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Field or Control	*Description*
Hold Status	Current status of the hold. This is a display-only field for regular users, such as most customer service contacts. However, users with manager-level permissions can select one of the following statuses: • *Requires Action:* This selection indicates that action needs to happen. The system defaults to this status when the hold is created. • *In Process:* This selection indicates that the hold still needs to be addressed and some action is taking place in relation to the hold. • *Override Hold:* Select to ignore the hold and pass it. For example, you have a minimum price violation but are willing to allow the lower price for this order or quote. When this status is set, the system will no longer check the hold condition. When a hold is overridden, a note and reason can be assigned explaining why the hold was overridden. • *Passed:* This indicates that the hold has passed. The CSR can manually set this status, or the system will set this status when the order or quote has been submitted, and the condition has passed. When this status is set, the system will still check the hold condition, and set to *Requires Action* if the condition fails. **Note:** A manager with the correct set of permissions can override the hold by placing the hold in *Override Hold* status and resubmitting the order or quote.
Status Date	Indicates the date the Hold status last changed.
Failed Value	This is the value that is causing the Hold Reason.
Pass Value	This is the value that is required to remove the hold.

Maintaining Orders

This section provides an overview of order maintenance.

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Understanding Order Maintenance

Order maintenance and quote revisioning are triggered by the same toolbar button. This button allows changes to order data based upon configurable rules defined in the Capture Type Workbench. These rules determine the status of the order, and order lines, and will allow changes to certain data elements based upon this status.

To understand order maintenance, consider both the header statuses and the line statuses that are delivered out of the box, and how they map to the PeopleSoft Supply Chain Management fulfillment system. An order for example cannot be changed if has been shipped, or if the fulfillment system has not acknowledged its existence. In this overview section are two tables: one explains Order Capture header statuses and the second shows how line statuses in CRM map to PeopleSoft Supply Chain Management.

Header Statuses

Here are the delivered header statuses that can be displayed on the Entry Form:

Header Status	***Description***
2000 (In Fulfillment)	The order is in the process of fulfillment. Quotes cannot have a status of *In Process* since quotes are not part of fulfillment.
9000 (Hold)	There is an open hold on the order, based on hold conditions.
3500 (Fulfillment Hold)	The Fulfillment system has placed a hold on the order.
1500 (Partial Hold)	The Fulfillment system has placed a hold on some products on the order.
6000 (Complete)	The order has gone through the fulfillment process. It has been shipped, or installed. **Important!** Once an order is set to *Complete*, the ordering process is considered finished and cannot be reversed.
1 (Canceled)	The order or quote has been canceled and no further action on this order or quote is necessary.
950 (Queued)	The order or quote has been created for a future date and is queued for later automatic submittal.
5000 (Expired)	The quote date has passed so the quote has expired.
500 (New)	The order or quote is new and has not been submitted.

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Header Status	*Description*
1000 (Submitted)	The order or quote has been submitted for processing.

See Capture Setup Tables - Header Statuses Workbench Page.

Line Statuses

The following table shows the delivered line status mappings between Order Capture and PeopleSoft SCM:

SCM Line Status	*CRM Line Status*	*CRM Line Partial Status*
B (Backordered)	2000 (Backordered)	2100 (Partially Backordered)
C (Closed)	6000 (Shipped)	6100 (Partially Shipped)
CMTD	1050 (Sold)	1050 (Sold)
DENY (Deny)	1060 (Lost)	1060 (Lost)
DRAF (Draft)	1010 (Draft)	1010 (Draft)
H (On Hold)	3500 (Fulfillment Hold) **Note:** Holds that originate in CRM have the status, 9000. This is to differentiate a Hold that originated in CRM (status 9000), from a Hold that originated in SCM.	3500 (Fulfillment Hold)
I	5700 (Billed)	5750 (Partially Billed)
J	5750 (Partially Billed)	5750 (Partially Billed)
K (Picked)	5000 (Picked)	5100 (Partially Picked)
L	5100 (Partially Picked)	5100 (Partially Picked)
O (In Fulfillment)	4000 (In Fulfillment)	4100 (Partially In Fulfillment)
P (Pending)	3000 (Pending)	3100 (Partially Pending)

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SCM Line Status	*CRM Line Status*	*CRM Line Partial Status*
Q (Requisitioned)	4500 (Requisitioned)	4600 (Partially Requisitioned)
RDY (Ready)	1030 (Priced)	1030 (Priced)
S (Shipped)	6000 (Shipped)	6100 (Partially Shipped)
T	6100 (Partially Shipped)	6100 (Partially Shipped)
U (Purchased)	5500 (Purchased)	5600 (Partially Purchased)
V	3700 (Reserved)	3750 (Partially Reserved)
W	3750 (Partially Reserved)	3750 (Partially Reserved)
X (Canceled)	1 (Canceled)	1 (Canceled)

See Integration Definitions - Line Status Mappings Workbench Page.

Allowable Maintenance

For the purposes of an integration with PeopleSoft Supply Chain Management, Order Capture allows you to maintain orders where the header status is at least *Submitted* (1000) and not yet *Complete* (6000). Order Capture allows order maintenance out of the box, where PeopleSoft Supply Chain Management is the fulfillment system under the following conditions:

- If the header status is greater than *Submitted* (1000) but less than *Complete* (6000).
- If the line status is less than *Open* (1000), line configurations and attributes can be changed.
- If the line status is less than *In Fulfillment* (4000), line customer information can be changed.
- If the line status is less than *In Fulfillment* (4000), line pricing data can be changed.

Since an order with header status of *Queued* has not yet been submitted to back end processing, it is queued for later automatic submittal, a Queued order can be maintained. No change order is required if a Queued order is maintained, since no order has yet been sent to the fulfillment system.

Order Capture delivers integration points that support a realtime check into inventory to determine if the changes can be made based on the fulfillment status of the order. Additionally, all of the necessary integration points are delivered to pass the changed data to fulfillment in order to process the change request.

See Understanding Fulfillment Integration.

You can add products to an order or quote, change an order or quote, change the dates for a quote, and so on. With related actions, the system keeps a record of and links to the original quote or order, so that you

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can maintain a history of how the quote or order progressed. Both the revisioned quote and the original quote may be used and both remain in open status. This allows you to offer different revisions of the products and pricing to your customers, and allows the CSR (or sales representative) to order from either of the quotes. Only the revisioned order can be used once changes have been made to the order.

When order maintenance is complete, various order capture pages reflect the change activity. Upon order submission, not only is a new business project fired, the Related Actions page updated, but the History page is also updated to track those changes.

Note: Changes to a quote are through the quote revisioning process. Creating a quote revision copies the instance of the quote to a new quote, and increments the revision number. This enables you to modify the quote as required.

Related Links

Activating Integration Points
Capture Setup Tables - Line Statuses Workbench Page
Integration Definitions - Header Status Mappings Workbench Page
Publishing Order and Quote Messages
Subscribing to Order Status Messages

Viewing Related Actions

This section discusses how to view related actions and work with business projects.

Page Used to View Related Actions

Page Name	*Definition Name*	*Usage*
Order - Related Actions Page or Quote - Related Actions Page	RO_ASSOCIATION	View related actions for orders and quotes.

Order - Related Actions Page or Quote - Related Actions Page

Use the Order - Related Actions page or Quote - Related Actions page (RO_ASSOCIATION) to view related actions for orders and quotes.

Navigation:

- **Orders and Quotes** > **Add Order** > **Order - Related Actions**
- **Orders and Quotes** > **Add Quote** > **Quote - Related Actions**
- **Orders and Quotes** > **Search Orders and Quotes** > **Order - Related Actions**
- **Orders and Quotes** > **Search Orders and Quotes** > **Quote - Related Actions**

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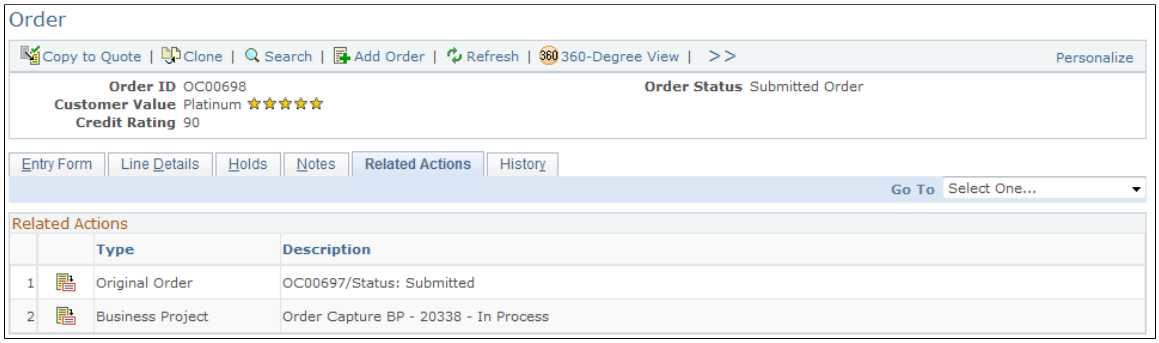
This example illustrates the fields and controls on the Order - Related Actions page.



This page enables CSRs to view related actions for the order. A related object is data, such as a business project, that is associated with the order or quote. This data can reside in another PeopleSoft CRM application.

Related Actions

Field or Control	*Description*
	Click to open the related object in a new browser window.
Type	This is the type of related action. Related actions include, but not limited to, business projects, product upsells, correspondence, and so on.

Working with Business Projects

Business projects help organize process flow and are invaluable in tracing the order change activity. Order Capture business projects, including Order, Quote, and Order Maintenance business projects are discussed in the Understanding Order Capture Business Projects topic.

Viewing History

This section discusses how to view history details.

Page Used to View History

Page Name	*Definition Name*	*Usage*
Order - History Page or Quote- History Page	RO_HISTORY	View change history and interaction history of orders and quotes.

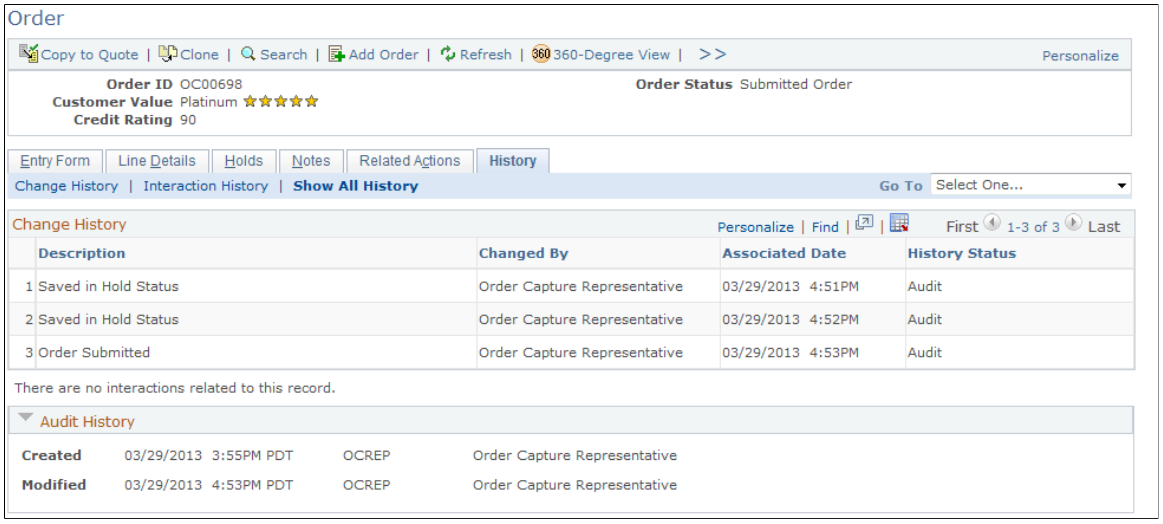
Order - History Page or Quote- History Page

Use the Order - History page (RO_HISTORY) to view change history and interaction history of orders and quotes.

Navigation:

- **Orders and Quotes** > **Add Order** > **Order - History**
- **Orders and Quotes** > **Add Quote** > **Quote - History**
- **Orders and Quotes** > **Search Orders and Quotes** > **Order - History**
- **Orders and Quotes** > **Search Orders and Quotes** > **Quote - History**

This example illustrates the fields and controls on the Order - History page.



Each capture type is associated with a list of audit events for which history log is to be captured when those events occur at runtime.

The Change History section lists any of those events that happened during the life of the order.

The Interaction History section displays the summary information of all interactions that have been created for the order.

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Chapter 10

Working with Bulk Orders

Understanding Bulk Order Enablement

Bulk order functionality allows a customer service representative (CSR) to place single orders for multiple recipients as part of a single transaction. For example, a department manager in a company may want to order twenty office phones, one for each of their direct reports, and have each phone shipped directly to their employee. They can now perform this function using bulk order creation without having to enter separate orders for each recipient.

Note: Subsequent to order submission, Order Capture creates orders for each of the recipients. These orders can later be maintained and fulfilled individually.

Bulk ordering allows you to perform the following tasks in Order Capture:

- Create bulk orders directly from the main CRM menu navigation.
- Take orders for multiple recipients within an organization. These selections are based on the Relationship Hierarchy for a customer.
- Specify more than one order (create multiple orders) per recipient.
- Create a primary order that is associated to numerous recipient orders, and view a summary of all recipient orders associated with a primary order.
- Copy attribute and configuration information from the primary bulk order to recipient orders.
- Apply discounts (pricing rules) at the primary order level.
- Perform hold processing and validation routines normally associated with simple orders.

  Note: Bulk order uses a hold condition where recipients have not been specified for the recipient orders.

Implementing Bulk Ordering

This section discusses how to define bulk order business unit options.

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Pages Used to Implement Bulk Ordering

Page Name	*Definition Name*	*Usage*
Order Capture Definition - Internal Page	BUS_UNIT_RO1	Define bulk ordering defaults for your business unit in the **Bulk Order** group box. See Order Capture Definition - Internal Page.
Capture Setup Tables - Header Statuses Workbench Page	RO_DEFN_HDSTAT	View or edit bulk order header statuses. See Capture Setup Tables - Header Statuses Workbench Page.
Capture Setup Tables - Hold Codes Workbench Page	RO_DEFN_HOLD	View or edit bulk order hold codes. See Capture Setup Tables - Hold Codes Workbench Page.
Type Definition - Hold Processing Workbench Page	RO_TYPE_HOLD	Enable the bulk order holds for a capture type, such as order or quote. See Type Definition - Hold Processing Workbench Page.

Defining Bulk Order Business Unit Options

Access the Order Capture Definition - Internal Page(Set Up CRM, Business Unit Related, Order Capture Definition, Order Capture Definition - Internal).

Bulk Order

On the Order Capture Definition page you will plug in relationship views for both consumers and organizations. Your primary order/recipient order relationships are determined by the relationships you have established in the Relationship Viewer. Therefore, you must first define your relationship views in **Set Up CRM** > **Common Definitions** > **Customer** > **Configure Relationship Views.**

Field or Control	*Description*
Consumer Hierarchy	Select a relationship view for a single consumer, or contact. This will determine all of the possible bulk order recipients at runtime by automatically populating all of the child relationships for the parent chosen here.

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Field or Control	*Description*
Organization Hierarchy	Select a relationship view for the company, or organization. When the end user enters a company name, it will prompt against the table you select here to determine the child relationships available.
Multiple Orders Per Recipient	Select this check box if you want to allow single recipients to receive more than one order. An **Order** field appears on the runtime page, allowing you to enter the number of orders you want to specify per recipient.

Viewing or Editing Bulk Order Header Statuses

Access the Capture Setup Tables - Header Statuses Workbench Page(Set Up CRM, Product Related, Order Capture, Setup Workbench, Capture Setup Tables Workbench. Click the **Header Statuses** link on the Capture Setup Tables Workbench page).

There are two statuses specifically for bulk orders: *Generating,* and *Generated*.

Field or Control	*Description*
Generating	Change the **Description** name or select the **Allow Manual Change to Status** check box to allow the CSR to manually change the header status during bulk order entry. This header status indicates that Order Capture is in the process of generating recipient orders. This status appears when the CSR clicks the **Generate Bulk Order** or **Submit Order** buttons on the Summary page.
Generated	The Generated status indicates that the recipient orders have been generated.

Viewing or Editing Bulk Order Hold Codes

Access the Capture Setup Tables - Hold Codes Workbench Page(Set Up CRM, Product Related, Order Capture, Setup Workbench, Capture Setup Tables Workbench. Click the **Hold Codes** link on the Capture Setup Tables Workbench page).

There are two holds for bulk orders. These are:

1. *No Recipients Selected*

   The *NRECI* hold code applies to any bulk orders where no recipients have been defined.

2. *No Recipient Accounts*

In communications-specific transactions, the *NRACTS* hold code causes a hold on the bulk order if no recipient accounts have been selected for billing purposes.

Enabling Bulk Order Hold Processing

Access the Type Definition - Hold Processing Workbench Page(Set Up CRM, Product Related, Order Capture, Capture Type Workbench, Type Definition Workbench. Click the **Hold Processing** link on the **Type Definition Workbench** page).

Select the **Enabled** check box to activate the bulk order hold code on the Hold Processing page.

Creating Bulk Orders

This section provides an overview of bulk order creation, and discusses how to create, view and edit bulk order business projects.

Pages Used to Create Bulk Orders

Page Name	*Definition Name*	*Usage*
Bulk Order - Entry Form Page	RO_FORM	Create a bulk order.
Hierarchal View for Customer Page	RO_BULK_CUST_SEC	Select multiple recipients for the bulk order.

Understanding Bulk Order Creation

Customer Sales Representatives (CSRs) create bulk orders in one of two ways:

- Create a simple order and then convert the order to a bulk order.

Term	*Definition*
Convert To Bulk	Click to convert a simple order to a bulk order.

- The menu option, **Add Bulk Order,** is accessible from the primary CRM navigation, **Orders and Quotes** > **Add Bulk Order**. When CSRs click this menu option, they will go to the Entry Form page in Order Capture. However, the interface displays a new section appropriate for entering bulk ordering information.

Viewing and Editing Bulk Order Business Projects

Access the “Business Project Page” (Automation and Configuration Tools)(Set Up CRM, Common Definitions, Business Projects, Business Project).

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PeopleSoft delivers these business projects for bulk orders:

- Submit Bulk Child Orders business project (BULK_ORD_SUBMIT)

  This business project both generates and submits all recipient orders for processing.

- Bulk Order Generation business project (BULK_ORDER_GEN)

  This business project generates recipient orders from the list of recipients on the bulk order. It is invoked when you click the Generate Bulk Order button on the Entry Form. Note that unlike the other business project, it does not submit the recipient orders for processing.

Bulk Order - Entry Form Page

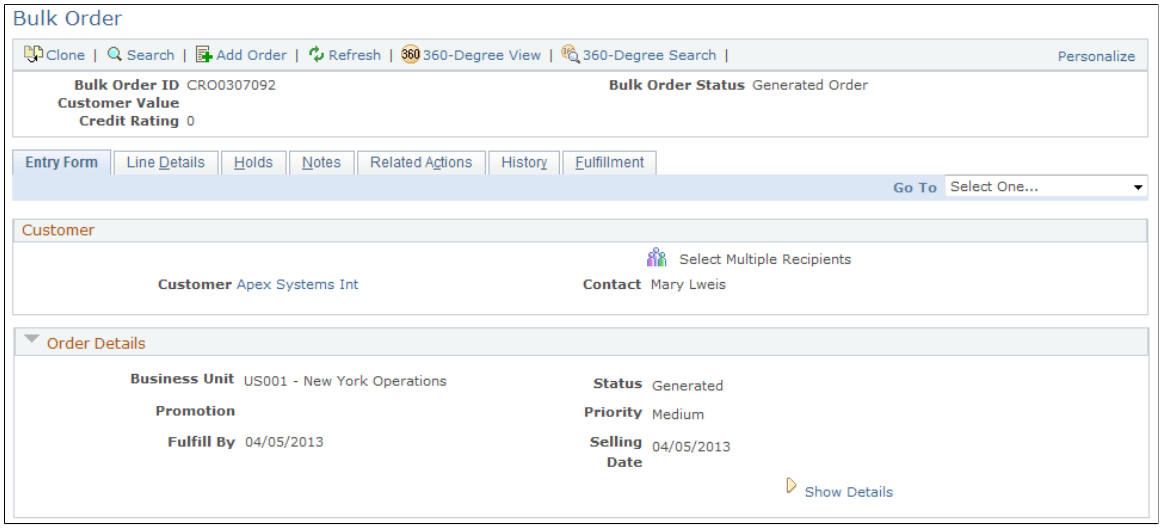
Use the Bulk Order - Entry Form page (RO_FORM) to create a bulk order.

Navigation:

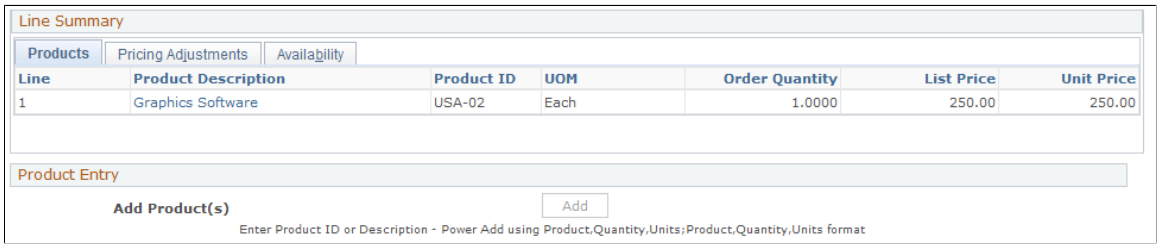
- **Orders and Quotes** > **Add Bulk Order** > **Bulk Order - Entry Form**
- **Orders and Quotes** > **Search Orders and Quotes**

  Select *Yes* to the **Bulk Order** search field and select a bulk order from the search result.

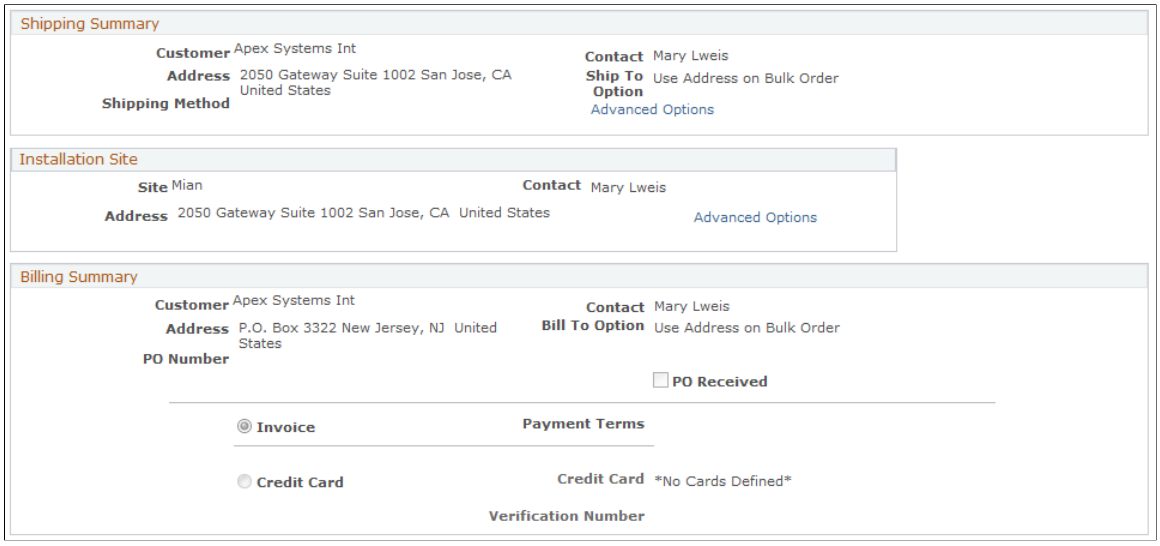
This example illustrates the fields and controls on the Bulk Order - Entry Form page (1 of 4).



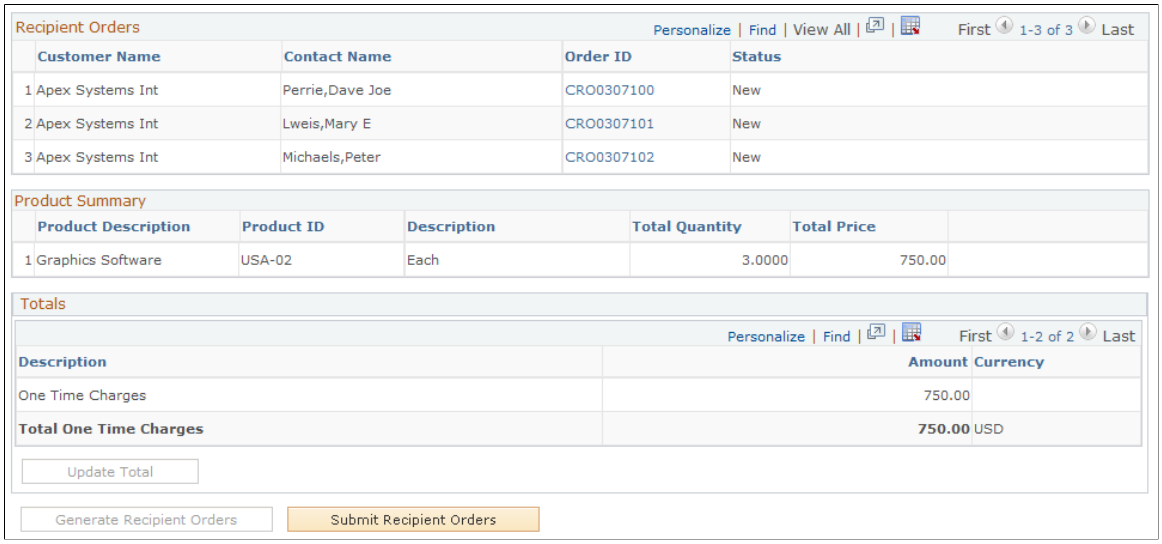
This example illustrates the fields and controls on the Bulk Order - Entry Form page (2 of 4).



This example illustrates the fields and controls on the Bulk Order - Entry Form page (3 of 4).



This example illustrates the fields and controls on the Bulk Order - Entry Form page (4 of 4).



Note: This section describes fields and options that are specific to bulk ordering use.

See Creating Orders or Quotes.

Customer

Field or Control	*Description*
Select Multiple Recipients	Click to access the Hierarchal View for Customer page and select all the child recipients for the bulk order. Be sure to first select a customer and contact prior to select child recipients. See Hierarchal View for Customer Page.

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Recipient Orders

This section lists the child orders (one for each selected recipient) that will be created for the parent bulk order. If child orders are already generated, the order IDs and order statuses are listed accordingly. If the status of any child orders has been updated, it gets reflected in this section when the bulk order is refreshed.

Note: If you are integrating to PeopleSoft Order Management (SCM), you must define a Sold To relationship for companies and their contacts in the relationship hierarchy, otherwise recipient orders go on *Hold*. You can inactivate the *Hold* condition from the Capture Type workbench. The same hold condition principle applies for both Bill To and Ship To relationships.

Product Summary

This section lists the products the are added to the bulk order and their summary information, including product description, ID, unit of measure, total quantity and price.

Field or Control	***Description***
Generate Recipient Orders	Click to create recipient orders without submitting them for processing. These then become *New* recipient orders. You may want to use this option if you want to navigate to a specific order and change it. **Note:** After generating recipient orders, but prior to submitting them, CSRs can edit the recipient orders and all of the changes are applied.
Submit Recipient Orders	Click to create (if not done already) and submit all recipient orders for processing.

Hierarchal View for Customer Page

Use the Hierarchal View for Customer page (RO_BULK_CUST_SEC) to select multiple recipients for the bulk order.

Navigation:

Click the **Select Multiple Recipients** link (after selecting a customer) on the Bulk Order - Entry Form page.

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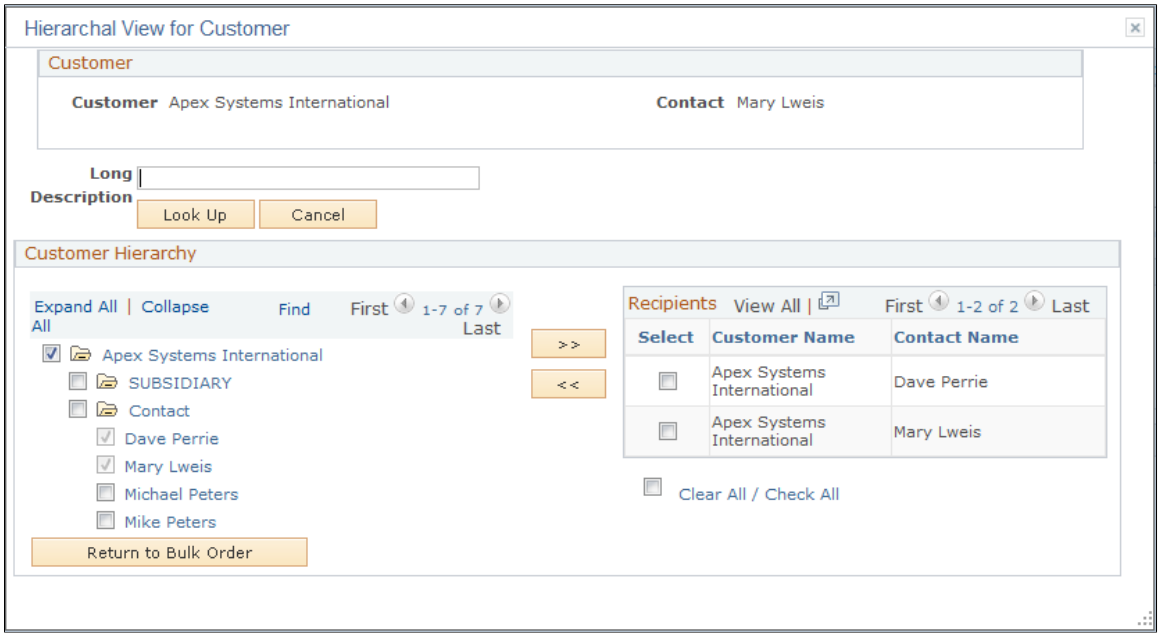
This example illustrates the fields and controls on the Hierarchal View for Customer page.



Based on relationship views, you can select the child recipients for the bulk order. The **Filter** field allows you to narrow your search results with specific name parameters, thereby restricting the search results.

Customer Hierarchy

From the tree view that appears, select the contacts you want to add to the bulk order as recipients. Click the **Add Selections to Order** button to add selected contacts to the **Recipients** section on the right.

Recipients

Field or Control	*Description*
Orders	If the option to allow multiple orders to be created for each recipient is enabled at the business unit level, the Orders column appears. The system populates the value of 1 as the default number of order to create for each listed recipient; you can update this value as necessary. Once all recipients have been selected, return to the main order entry form page to save or submit the bulk order.

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Chapter 11

Working with PeopleSoft Proposal Management

Understanding PeopleSoft Proposal Management Integration

PeopleSoft Proposal Management is part of a suite of Enterprise Service Automation (ESA) applications, within PeopleSoft Financial Management Solutions' product line. PeopleSoft CRM has the ability to send PeopleSoft Proposal Management information when an engagement service product is included in a quote. This occurs if the quote originates from a PeopleSoft Sales lead or opportunity, or if the quote is entered directly on the Order Capture Entry Form. Integration points between Order Capture and PeopleSoft Proposal Management are synchronous in order to receive the proposal and version IDs assigned when a proposal is created.

You can also receive pricing information when an engagement is fulfilled in PeopleSoft Proposal Management. Updates are made to prices on the quote and on the lead or opportunity. PeopleSoft CRM workflow informs the sales representative that the lead or opportunity has been updated. Status updates are transmitted between PeopleSoft Sales and the Proposal Management system when a lead or opportunity or quote is sold or lost. This again occurs through the Order Capture application.

Organizations must make informed decisions about which opportunities to pursue based on estimated cost and potential revenue. In addition, each opportunity may have several different scenarios for its completion, each with its own estimated costs. At any point in your business cycle, your organization may be faced with service-related opportunities. Customers using Order Capture can initiate service-based proposals from within Order Capture through an interface with PeopleSoft Proposal Management. For opportunities requiring manual entry, you can create and price multiple service-based proposals.

Engagement services are tracked as service-type products in the PeopleSoft CRM Product Data Model. Sales users can add these product types to a lead or opportunity. The price is pulled from the list price and sales users can override it with an initial price. When the lead or opportunity is converted to a quote and the quote is submitted, a message is sent from Order Capture to PeopleSoft Proposal Management with the necessary information for the engagement to be priced. A proposal is created for each product line sent to PeopleSoft Proposal Management.

Order Capture's integration to PeopleSoft Proposal Management allows your organization to perform all of the following activities:

- Generate multiple proposal versions to find the situation that best fits your business needs. Once a proposal is finalized, you can use the data you have already entered for that proposal to create contracts and projects in PeopleSoft Contracts and PeopleSoft Project Costing, assuming you have purchased those Enterprise Service Automation application modules.
- Pursue an initiative or engagement service contract that has not yet been accepted.

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- Create and edit proposals, copy proposals, customize rates, view all current proposals, configure a list to view only selected proposals, view overall proposal cost and billing information, and store and view relevant files such as requests for proposals and terms and conditions.
- Create versions of a project that could possibly be done in different ways. This highlights cost differences between completing an assignment in a very short time frame using many resources, and completing the same assignment in a longer time frame with fewer resources. You can then look at the problem from different angles and choose the most practical solution.
- Develop and administer project proposals to better expedite closure of business opportunities, and reuse proposal versions for future engagements.

Understanding Integration Points

Proposal integration consists of two application messages:

- OC_ESA_PROPOSAL

  When a quote is submitted for an engagement-type service in Order Capture, Order Capture sends the proposal request message, OC_ESA_PROPOSAL, to PeopleSoft Proposal Management.

- OC_ESA_PROPOSAL_RESPONSE

  In response to this message, PeopleSoft Proposal Management sends the message, OC_ESA_PROPOSAL_RESPONSE, to Order Capture to return the Capture ID, Proposal ID, and Version ID.

  Note: The OC_ESA_PROPOSAL_RESPONSE application message contains the record in which to receive the response data; the name of this record is ESA_OC_RESPONSE.

The system sends these fields from Order Capture to PeopleSoft Proposal Management:

Source: Order Capture	***Target: PeopleSoft Proposal Management***		
Record	*Field*	*Record*	*Field*
RO_HEADER	CAPTURE_ID	GM_PROPOSAL	CAPTURE_ID
BUS_UNIT_TBL_RO	BUSINESS_UNIT_ESA	GM_PROPOSAL	BUSINESS_UNIT
RO_LINE	PRODUCT_ID	GM_PROPOSAL	PRODUCT_ID
PROD_ITEM	DESCR	GM_PROPOSAL	PRODUCT_DESCR
RO_LINE	PRICE	GM_PROPOSAL	PRICE

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Source: Order Capture	***Target: PeopleSoft Proposal Management***		
RO_LINE	CURRENCY_CD	GM_PROPOSAL	CURRENCY_CD
RO_NOTE	DESCRLONG	GM_PROP_COMMENT	DESCRLONG
RB_INT_CUST_ADS	CUST_ID	GM_PROPOSAL	CUST_ID
RSF_OPPORTUNITY or RSF _LEAD **Note:** System uses either record depending on if the quote has a lead or an opportunity attached.	SALES_USER_NAME	GM_PROPOSAL	SALESREP_NAME
Note: System uses PeopleCode to retrieve phone and extension information. Not a direct read of a record.	CC_PHONE_EXTENSION	GM_PROPOSAL	CC_PHONE_EXTENSION
Note: System uses PeopleCode to retrieve email address information. Not a direct read of a record.	EMAIL_ADDR	GM_PROPOSAL	EMAIL_ADDR
RO_ASSOCIATION	PROPOSAL_ID	GM_PROPOSAL	PROPOSAL_ID
RO_ASSOCIATION	VERSION_ID	GM_PROPOSAL	VERSION_ID
RO_HEADER	QUOTE_EXPIRE_DT	GM_PROPOSAL	DUE_DATE
RO_HEADER	DESCR50	GM_PROPOSAL	PROPOSAL_TITLE
RO_HEADER	CAPTURE_DATE	GM_PROPOSAL	BEGIN_DT
RO_HEADER	QUOTE_DUE_DATE	GM_PROPOSAL	END_DT

In response to the first message, the system sends these fields from PeopleSoft Proposal Management to Order Capture:

Source: PeopleSoft Proposal Management	***Target: Order Capture***		
Record	*Field*	*Record*	*Field*
ESA_OC_RSPN	PROPOSAL_ID	RO_ASSOCIATION	PROPOSAL_ID
ESA_OC_RSPN	VERSION_ID	RO_ASSOCIATION	VERSION_ID
ESA_OC_RSPN	CAPTURE_ID	RO_ASSOCIATION	CAPTURE_ID
ESA_OC_RSPN	BUSINESS_UNIT	RO_ASSOCIATION	ASSOC_BUS_UNIT
ESA_OC_RSPN	MESSAGE_TEXT	N/A	N/A

Note: The system uses the MESSAGE_TEXT field to log error messages if any errors occur when the proposal is being created or updated.

PeopleSoft Proposal Management uses the customer number to query the customer table for customer name and current contact information. When PeopleSoft Proposal Management receives the message, the following occurs:

- If the proposal ID is blank, the system creates a new proposal.
- If the proposal ID is not blank, the system updates the existing proposal.
- If a quote has expired, you can revise it on the Entry Form in Order Capture.

  This creates a new quote with a new capture ID. The system then passes the proposal ID to PeopleSoft Proposal Management from the original quote. PeopleSoft Proposal Management checks if the proposal has been closed out (proposal status equals *Canceled*). If it has, the system reopens the proposal for pricing (and the proposal status is updated to *Draft*).

Quote Integration

Once pricing information is completed in PeopleSoft Proposal Management, the application message, ESA_PROPOSAL_PRICE, sends pricing information back to Order Capture. This occurs when a user clicks the **Set To Ready** button on the Maintain Proposal page in PeopleSoft Proposal Management. After the system sends the message to Order Capture, the selected proposal version is locked and uneditable.

The system sends these fields from PeopleSoft Proposal Management to Order Capture:

Source: PeopleSoft Proposal Management	***Target: Order Capture***		
Record	*Field*	*Record*	*Field*

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Source: PeopleSoft Proposal Management	***Target: Order Capture***		
GM_PROPOSAL	PROPOSAL_ID	RO_ASSOCIATION	PROPOSAL_ID
GM_PROPOSAL	VERSION_ID	RO_ASSOCIATION	VERSION_ID
GM_PROPOSAL	BUSINESS_UNIT	RO_HEADER	BUSINESS_UNIT
GM_PROPOSAL	TOTAL_BUDGET_AMT	RO_LINE	PRICE
GM_PROP_COMMENT	DESCRLONG	RO_NOTE	DESCRLONG

Note: PeopleSoft Proposal Management sends note descriptions to Order Capture, but Order Capture does not update them.

PeopleSoft Sales Integration

The system triggers the Order Capture application message, OC_ESA_PROPOSAL_STATUS, in the following situations:

- When a sales lead or opportunity is lost or sold.
- When the direct quote or order is sold.
- When the quote is cancelled (either manually, or from the quote expiring).
- When the quote needs to be repriced.

When PeopleSoft Proposal Management receives the message, it updates the corresponding proposal version with either the *Draft, Denied,* or *Committed* status, which is based on the contents of the message.

The system sends these fields from Order Capture to PeopleSoft Proposal Management:

Source: Order Capture	***Target: PeopleSoft Proposal Management***		
Record	*Field*	*Record*	*Field*
RO_ASSOCIATION	PROPOSAL_ID	GM_PROPOSAL	PROPOSAL_ID
RO_ASSOCIATION	VERSION_ID	GM_PROPOSAL	VERSION_ID
RO_ESA_BU	BUSINESS_UNIT_ESA	GM_PROPOSAL	BUSINESS_UNIT

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Source: Order Capture	***Target: PeopleSoft Proposal Management***		
RO_HEADER	CAPTURE_ID	GM_PROPOSAL	CAPTURE_ID
RO_LINE.STATUS	STATUS_CODE	GM_PROPOSAL	SUBMIT_STATUS
RO_NOTE	DESCRLONG	GM_PROP_COMMENT	DESCRLONG

When PeopleSoft Proposal Management receives the message, the following occurs:

- If the order capture line status is *Lost,* the system updates the proposal status to *Denied.*
- If the order capture line status is *Sold,* the system updates the proposal status to *Committed.*
- If the order is expired, the system updates the proposal status to *Canceled.*
- If the order capture line status is *Negotiate,* the system updates the proposal status to *Draft* and enables repricing for the related proposal version.
- If the status is *Ready* when a user selects a proposal, the system locks the proposal version and prevents editing.

Quote Status Mappings

The table below shows how quote statuses map between Order Capture and PeopleSoft Proposal Management:

Order Capture Status	***PeopleSoft Proposal Management Status***
Draft	Draft
Priced	Ready
Negotiate	Draft
Lost	Denied
Sold	Committed
Canceled	Canceled

Setting Up PeopleSoft Proposal Management Integration

This section provides an overview of setup for the proposal management integration.

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Pages Used to Set Up PeopleSoft Proposal Management Integration

Page Name	*Definition Name*	*Usage*
Product Definition - Definition Page	PROD_DEFN	Define engagement service-type products.
Order Capture Definition - Internal Page	BUS_UNIT_RO1	Map the Order Capture business unit to the corresponding business unit in PeopleSoft Proposal Management.
Capture Setup Tables - Header Statuses Workbench Page	RO_DEFN_HDSTAT	View or edit the *Expired* header status for PeopleSoft Proposal Management integration.
Capture Setup Tables - Line Statuses Workbench Page	RO_DEFN_LNSTAT	View or edit engagement service line statuses.
Capture Setup Tables - Line Status Types Workbench Page	RO_DEFN_LS_TYPE	View or edit engagement service line status types.
Capture Setup Tables - Line Statuses DropDown Workbench Page	RO_DEFN_LNPRMPT	Control or view the drop-down list values available for your engagement service products.
Integration Definitions - Line Status Mappings Workbench Page	RO_DEFN_LNSTMAP	View or edit line status mappings between Order Capture and PeopleSoft Proposal Management.
Type Definition - Business Process Conditions Workbench Page	RO_TYPE_BPEVENT	View or edit the PeopleSoft Proposal Management business project, *Engagement Service BP.*

Understanding Setup for Proposal Management Integration

First define your engagement service product in the CRM product definition. The **Engagement Services** check box appears on the Product Definition pages for your primary application.

Next select the PeopleSoft Proposal Management business unit with which Order Capture integrates. Then we have added Proposal Management-specific settings to the Order Capture workbenches, allowing you some flexibility in how you set up certain essential operations. Two Order Capture workbench pages help control the available line statuses for quotes. The values that are displayed in the drop-down list box depend on the current line status. The first page defines the status types. One type is used for the engagement services products. The other delivered type is *Default*, which is used if the product is not an engagement product. You can view and edit the business project, *Proposal Management BP*, that has been created for the integration. Finally, you will need to activate the PeopleSoft Proposal Management integration messages to begin to take advantage of this functionality.

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Defining Engagement Service Products for PeopleSoft CRM

Access the “Product Definition - Definition Page” (PeopleSoft Product and Item Management)(Products CRM, Product Definition, Product Definition - Definition).

Select a product type of *Engagement Service* to create engagement service products.

Note: The list price will represent a baseline price, and the Enterprise Pricer pricing engine will not be invoked for engagement services.

Selecting a PeopleSoft Proposal Management Business Unit

Access the Order Capture Definition - Internal Page(Set Up CRM, Business Unit Related, Order Capture Definition, Order Capture Definition - Internal).

Field or Control	*Description*
Proposal Management	Select the PeopleSoft Proposal Management business unit which you want to integrate with Order Capture.

Viewing or Editing Setup Workbench Options

There are several Order Capture Setup Workbench changes for this integration:

- Header Statuses.
- Line Statuses.
- Line Status Types.
- Line Status DropDown.

Header Statuses

Access the Capture Setup Tables - Header Statuses Workbench Page(Set Up CRM, Product Related, Order Capture, Setup Workbench. Click the **Header Statuses** link on the Capture Setup Tables Workbench page).

We have added one new header status to the existing list of headers statuses for Order Capture.

Since a quote has an expiration date, a batch job examines the quote expiration dates and assigns any expired quotes a new header status of *Expired*, or whatever you choose to call it here.

Note: This action also triggers an integration point to update any associated proposals in the PeopleSoft Proposal Management system to *Canceled*. The exception to this rule is, that if any other quote that is not expired has a reference to the same proposal ID, it will not be cancelled in PeopleSoft Proposal Management. If an *Expired* quote is revised, the line status for the engagement status will be reset to *Draft* and a message is automatically sent to PeopleSoft Proposal Management.

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Line Statuses

Access the Capture Setup Tables - Line Statuses Workbench Page(Set Up CRM, Product Related, Order Capture, Setup Workbench. Click the **Line Statuses** link on the Capture Setup Tables Workbench page).

There are six line statuses for engagement services. These line statuses appear on the Entry Form page, and they map to corresponding statuses in PeopleSoft Proposal Management. You can edit the names of these statuses on this page.

Line Status Types

Access theCapture Setup Tables - Line Status Types Workbench Page (Set Up CRM, Product Related, Order Capture, Setup Workbench. Click the **Line Status Types** link on the Capture Setup Tables Workbench page).

The values displayed in the dropdown for the quote lines will depend on the line status. This page defines the status types. The *Engagement Service* line status type is used for engagement services products, whereas the *Default* line status type is used for any product that is not flagged as an engagement service product.

Line Statuses DropDown

Access the Capture Setup Tables - Line Statuses DropDown Workbench Page(Set Up CRM, Product Related, Order Capture, Setup Workbench. Click the **Line Statuses DropDown** link on the Capture Setup Tables Workbench page).

What you define as your available status types on the Line Statuses page determines what you see on this page. Since we deliver *Engagement Service* and *Default*, you can specify alternative status values for each of these two types.

Viewing or Editing Integration Workbench Options

Access the Integration Definitions - Line Status Mappings Workbench Page(Set Up CRM, Product Related, Order Capture, Integration Workbench. Click the **Line Status Mappings** link on the **Integration Definitions Workbench** page).

Line Status Mappings are used because the Proposal Management uses alpha-numeric status values, such as *CMTD* and *DENY,* whereas CRM Order Capture uses numeric status values. This mapping between the status values ensures that the integration points can communicate status information correctly.

Viewing or Editing the PeopleSoft Proposal Management Business Project

Access theType Definition - Business Process Conditions Workbench Page (Set Up CRM, Product Related, Order Capture, Capture Type Workbench. Click the **Business Process Conditions Workbench** link on the Type Definition Workbench page).

This business project consists of an application engine program, RO_ESA_PUB. The process runs if all of the following conditions apply: the application message, OC_ESA_PROPOSAL is active, the business project is active, and the business project event is set up and active. If no quote lines contain engagement service products, the program exits without calling any integrations. As with all Order Capture business projects, you can view the status of the business project on the Related Objects page.

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Activating PeopleSoft Proposal Management Integration Messages

To activate integration between Order Capture and PeopleSoft Proposal Management, you must activate these messages at the message level.

- OC_ESA_PROPOSAL
- OC_ESA_PROPOSAL_RESPONSE
- ESA_PROPOSAL_PRICE
- OC_ESA_PROPOSAL_STATUS

Running Process Scheduler

A PeopleTools Process Scheduler job is in place that sets the status of quotes to *Expired* when the **Quote Expire Date** is less than the current system date. The quote line status values do not change, but the quote's header status is updated. If the quote contains an engagement service product for which a proposal has been created, it will send the OC_ESA_PROPOSAL_STATUS message to PeopleSoft Proposal Management with a *Canceled* status, provided that no other quotes linked to this same proposal have expired.

To run this new job, navigate to **PeopleTools** > **Process Scheduler** > **Schedule JobSet Definitions**. You can schedule the process to run based on a **Recurrence Name**, or you can select the **Run Now** button to run the process immediately.

Using PeopleSoft Proposal Management in Order Capture

This section explains the basic functionality available in Order Capture, and shows new views available for line details and summary.

PeopleSoft Proposal Management creates a proposal for each quote line that contains an engagement service. Engagement products may not be added directly to an order, but instead must be created on a quote. This allows the communication of the pricing information from PeopleSoft Proposal Management, and it allows the negotiation process to begin when a price is not acceptable to the customer. Once the price received from PeopleSoft Proposal Management is acceptable, the quote can be converted to an order, and the engagement service will change to a status of *Sold*, and be fulfilled. Only engagements with a status of *Priced* are copied over to the new order. For a quote line that contains an engagement service, the following all apply at runtime:

- Unit price is equal to the list price of the product, and this is changeable.
- Order quantity is equal to one.
- Unit of measure is equal to the default unit of measure for the product.
- Line price is protected and the pricing engine is not invoked for engagement services. The line can still be used by the pricing engine to give discounts to other lines or to the entire order.
- Drill-down capability is added to the Related Objects page. This allows the CSR to view all of the specific details of the engagement in PeopleSoft Proposal Management.

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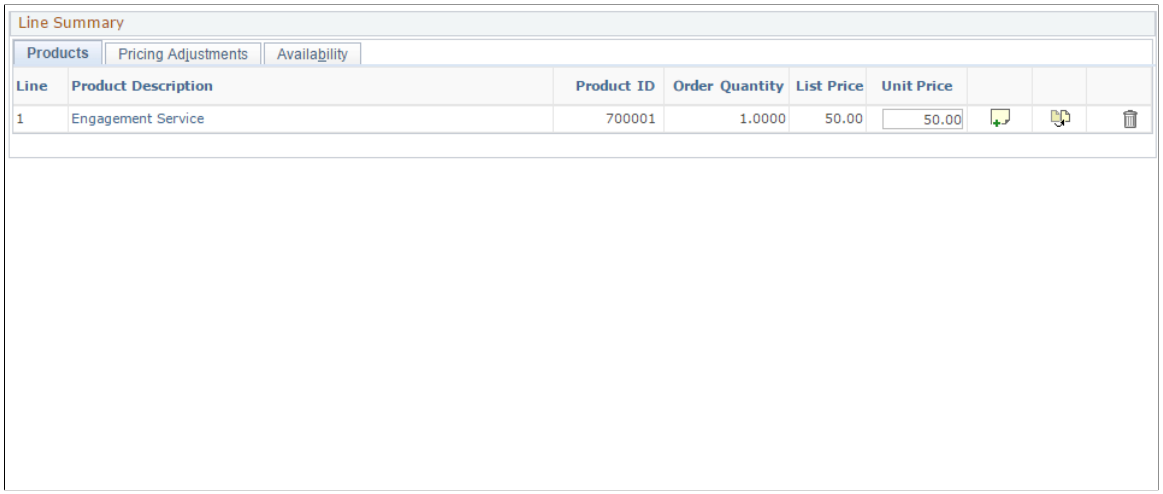
Line Details for Engagement Services Prior to Submission to PeopleSoft Proposal Management

Select an engagement service product and add it to the quote line.

This example illustrates the fields and controls on the Quote - Entry Form page (prior to submission to PeopleSoft Proposal Management.

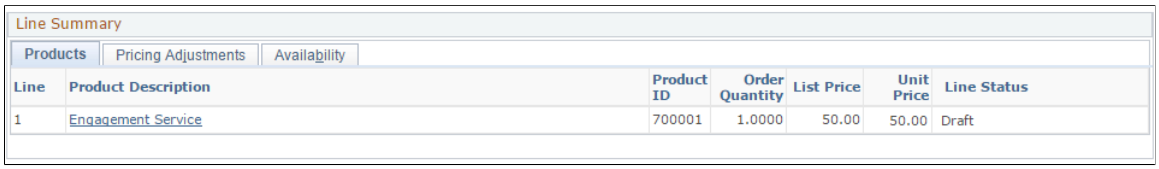


You cannot change unit of measure or order quantity for engagement service-type products.

Line Details for Engagement Services After Submission to PeopleSoft Proposal Management

Submit the engagement service quote to PeopleSoft Proposal Management.

This example illustrates the fields and controls on the Quote - Entry Form page (post submission to PeopleSoft Proposal Management).



When a quote for an engagement service has been submitted to PeopleSoft Proposal Management, it is priced. The correct unit price now defaults in. At this point, you have two options:

- Convert the quote to an order, which marks the engagement service as being *Sold*.
- Revise the quote if the price is not acceptable to the customer, by setting the status to *Negotiate*. In this scenario, a message is automatically returned to PeopleSoft Proposal Management. They can then change their status to *Draft*, and can consider changing the price once more.

  To perform this operation, click the Revise Quote (red crayon) icon on the Entry Form toolbar. On the quote copy, you can edit the quote lines, manually changing the status to *Negotiate*. Then you submit the quote once again. Order Capture sends its status EIP, OC_ESA_PROPOSAL_STATUS, and requests that this proposal go into *Draft* status. The same process occurs and PeopleSoft Proposal Management reprices the engagement.

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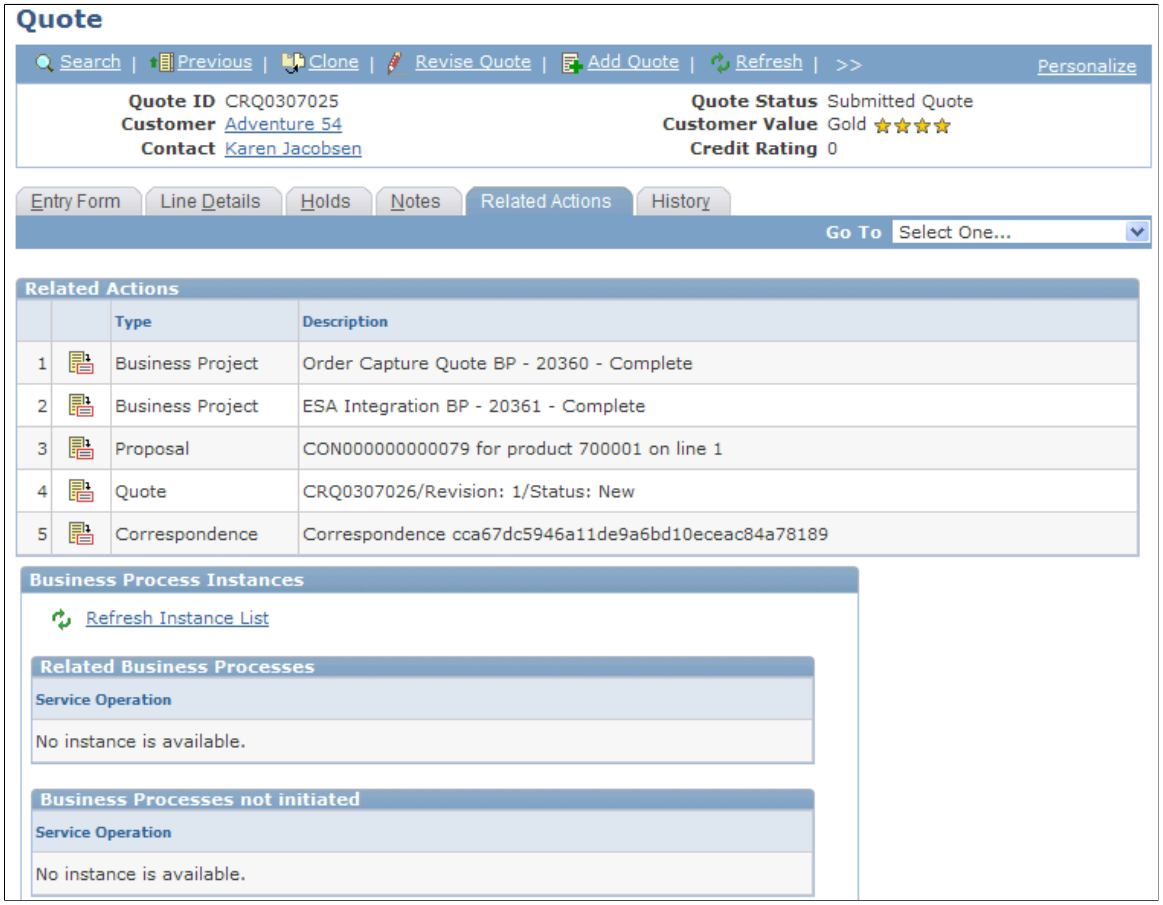
Note: Theoretically, a CSR or sales representative can go through the negotiation paradigm indefinitely. The final outcome may be to revise the quote and set status to *Lost,* where the customer has failed to agree to the terms of the offer.

Note: PeopleSoft Sales allows sales representatives to initiate a quote for an engagement from a lead or opportunity. The sales representative can go to that lead or opportunity to view the price on the engagement service product. PeopleSoft Sales information is continually updated by Order Capture, and it displays the same information that you find on the Entry Form in Order Capture.

Business Project for Proposals

Access the Quote - Related Actions page (Orders and Quotes, Search Orders and Quotes, Quote - Related Actions).

This example illustrates the fields and controls on the Quote - Related Actions page with an ESA integration business project.



When you access the ESA Integration BP business project details on the Business Project Status page, the proposal ID is displayed (when the business project is completed) and you can access the actual proposal using the link that is provided.

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Chapter 12

Working with Interactive Reports for Order Capture

Understanding CRM Interactive Reports

PeopleSoft CRM interactive reports are dynamic and interactive analytic reports. Interactive reports enable you to view and organize data in a wide variety of ways, which provides a more intensive overview of your collaborative selling activity.

You can better manage your sales solution activities by using interactive reports for Order Capture.

In Order Capture interactive reports, you can move around data elements on a report and instantly view the report using different dimensions. You can filter interactive reports data by selecting a single value for any dimension. You can also limit the interactive report so that it displays orders or quotes for one customer only. Looking at reports from different angles and perspectives affords an opportunity to gather valuable information about your business.

Interactive reports can be saved, exported to Microsoft Excel, or printed as hard copies. While you can be interactive with interactive reports by moving around data elements (dimensions), the changes that you make on the reports do not affect the PeopleSoft CRM database where the data originated.

Order Capture Interactive Reports

CRM Order Capture delivers four interactive reports:

- Order Revenue (for a single business unit).
- Order Metrics (for a single business unit).
- Enterprise Order Revenue (for all business units).
- Enterprise Order Metrics (for all business units).

Enterprise reports can analyze data across the enterprise or by specific business unit. Regular reports are restricted to individual business units. Depending upon the role assigned, users have access to either the two enterprise interactive reports or the two regular interactive reports.

Note: If a user has access to the two enterprise interactive reports, then that user can view analytics for specific business units as well as the entire enterprise.

Access to interactive reports in Order Capture is determined by user role. It is therefore possible to restrict access to enterprise-wide interactive report information. Review the following table for a list of interactive reports that can be launched by each predefined Order Capture role:

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Role	*Enterprise Order Revenue*	*Enterprise Order Metrics*	*Order Revenue for Single Business Unit*	*Order Metrics for Single Business Unit*
OCADMIN	No	No	Yes	Yes
OCMGR	Yes	Yes	Yes	Yes
OCREP	No	No	No	No

Setup for Interactive Reports for Order Capture

The four interactive reports for Order Capture are set up using Analytic Calculation Engine components. Setup is detailed in *PeopleTools: Analytic Calculation Engine*.

Setup includes specifying the model definition, query definition, and data source definition for each of the following:

- CR_RO_ORD_METRICS_BU (Order Metrics for a single business unit).
- CR_RO_ORD_REVENUE_BU (Order Revenue for a single business unit).
- CR_RO_ORD_METRICS (Enterprise Order Metrics for all business units).
- CR_RO_ORD_REVENUE (Enterprise Order Revenue for all business units).

Note: The Query Definition page does not require any changes during installation. However, the Model Definitions page requires updates at installation before you can run an Order Capture interactive report. Use the Model Definitions page to define the interactive reports server name as well as other locations that the runtime uses to launch interactive reports.

Related Links

"Understanding Interactive Reports" (Application Fundamentals)

Using Interactive Reports for Order Capture

This section provides an overview of the delivered Order Capture interactive reports.

When you access a interactive report directly from the menu navigation, a run control page appears. Enter the report criteria on this page. Default values for all fields are based on the run control that you last used; if you do not need to change the criteria, one click takes you to the interactive report. Alternatively, you can select a different run control (which updates the default values for the other fields), or you can directly edit the criteria fields.

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Profiles are stored by user, which means that users who repeatedly use the same criteria can enter that criteria once. The run control criteria (all fields except the run control name) are shared across all Order Capture interactive reports. This means that when a run control is created while running a single Order Capture interactive report, it is still available for all other interactive reports.

Pages Used to Run Interactive Reports for Order Capture

Page Name	*Definition Name*	*Usage*
Existing Run Control - Order Revenue Page	RO_BAM_REVBU_UPD	Launch the Order Revenue interactive report and view revenue information for a specific business unit.
Existing Run Control - Order Metrics Page	RO_BAM_METBU_UPD	Launch the Order Metrics interactive report and view metrics for a specific business unit.
Existing Run Control - Enterprise Order Revenue Page	RO_BAM_REV_UPD	Launch the Enterprise Order Revenue interactive report. You can select values and adjust dimensions to give an overall view of the enterprise. You can also view revenue information by business unit.
Existing Run Control - Enterprise Order Metrics Page	RO_BAM_MET_UPD	Launch the Enterprise Order Metrics interactive report. You can select values and adjust dimensions to give an overall view of the enterprise. You can also view metrics by business unit.

Dimensions

Interactive Reports are a combination of *Dimensions* and *Data Cubes*. Dimensions are static categories by which you group data, whereas the data cubes show the actual statistics. You can personalize the look of a interactive report by dragging and dropping the dimensions. Following are the available dimensions for Order Capture interactive reports:

Term	*Definition*
Currency	Choose the type of currency. You can view only a single currency at a time from within an interactive report. All orders and quotes are captured in the base currency. To see all orders or quotes that were captured in U.S. dollars, select *USD* as the currency, and the orders will be converted into U.S. dollars. To see all of the orders and quotes captured in euros, select *Euros* as the currency.
Business Unit	Select all business units, or choose a specific business unit.

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Term	*Definition*
Source	Select all capture sources, or select a single capture source such as *Phone*.
Months	Select the month for which you want to view data. To view all of the data, select *All Months.*
Region	Select the geographic region. This is the region associated with the Sold To customer. This may not be defined for all orders and quotes, so a unique selection of *Not Specified* is used to show the data associated with orders and quotes without a region defined for the Sold To customer.
Capture Type	Select either *All Captures*, *Order*, or *Quote*. To view orders only, select *Order*. To view quotes only, select *Quotes*. Select *All Capture Types* to see both orders and quotes.
Capture Status	Select the status of the orders or quotes, for example, *All*, *Canceled*, *Hold*, *Open*, or *Pending*.

Existing Run Control - Order Revenue Page

Use the Existing Run Control - Order Revenue page (RO_BAM_REVBU_UPD) to launch the Order Revenue interactive report and view revenue information for a specific business unit.

Navigation:

Orders and Quotes > **Interactive Reports** > **Order Revenue**

Select an existing run control or add a new run control for the Order Revenue interactive report. Click the Launch **Interactive Report** button on the Existing Run Control page.

Note: Use the run control criteria of *Start Date* and *End Date* to access this interactive report.

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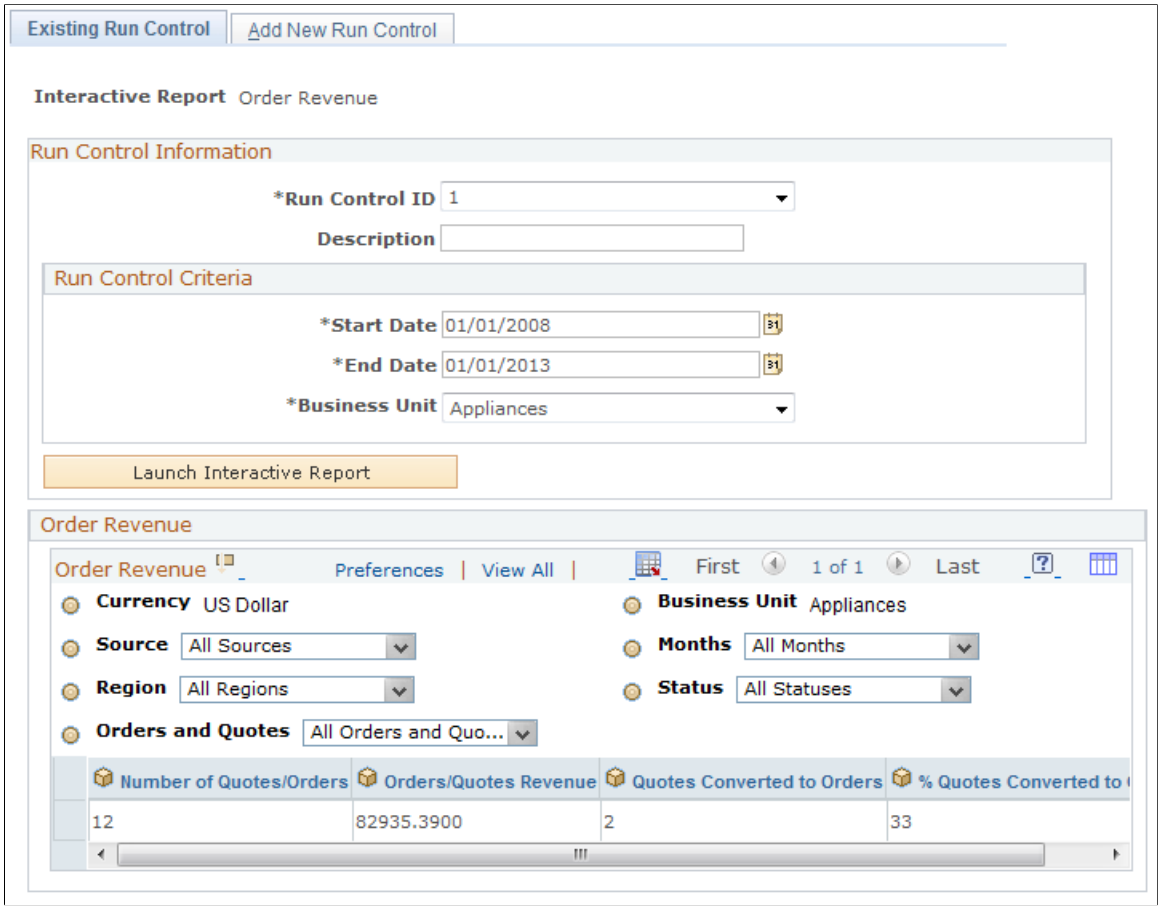
This example illustrates the fields and controls on the Existing Run Control - Order Revenue page.



Note: The data elements (cubes) on this page are common to both Enterprise Order Revenue (for multiple business units) and Order Revenue for a single business unit.

Field or Control	***Description***
Number of Quotes/Orders	Displays the total number of orders and quotes captured by the system for the dimensions currently selected.
Order/Quote Revenue	Displays the total value of the captures, in the selected currency for the dimensions currently selected.
Quotes Converted to Orders	Displays the total number of quotes converted to orders for the dimensions currently selected.
% Quotes Converted to Orders	Displays the total number of quotes converted to orders divided by the total number of quotes for the dimensions currently selected.

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Existing Run Control - Order Metrics Page

Use the Existing Run Control - Order Metrics page (RO_BAM_METBU_UPD) to launch the Order Metrics interactive report and view metrics for a specific business unit.

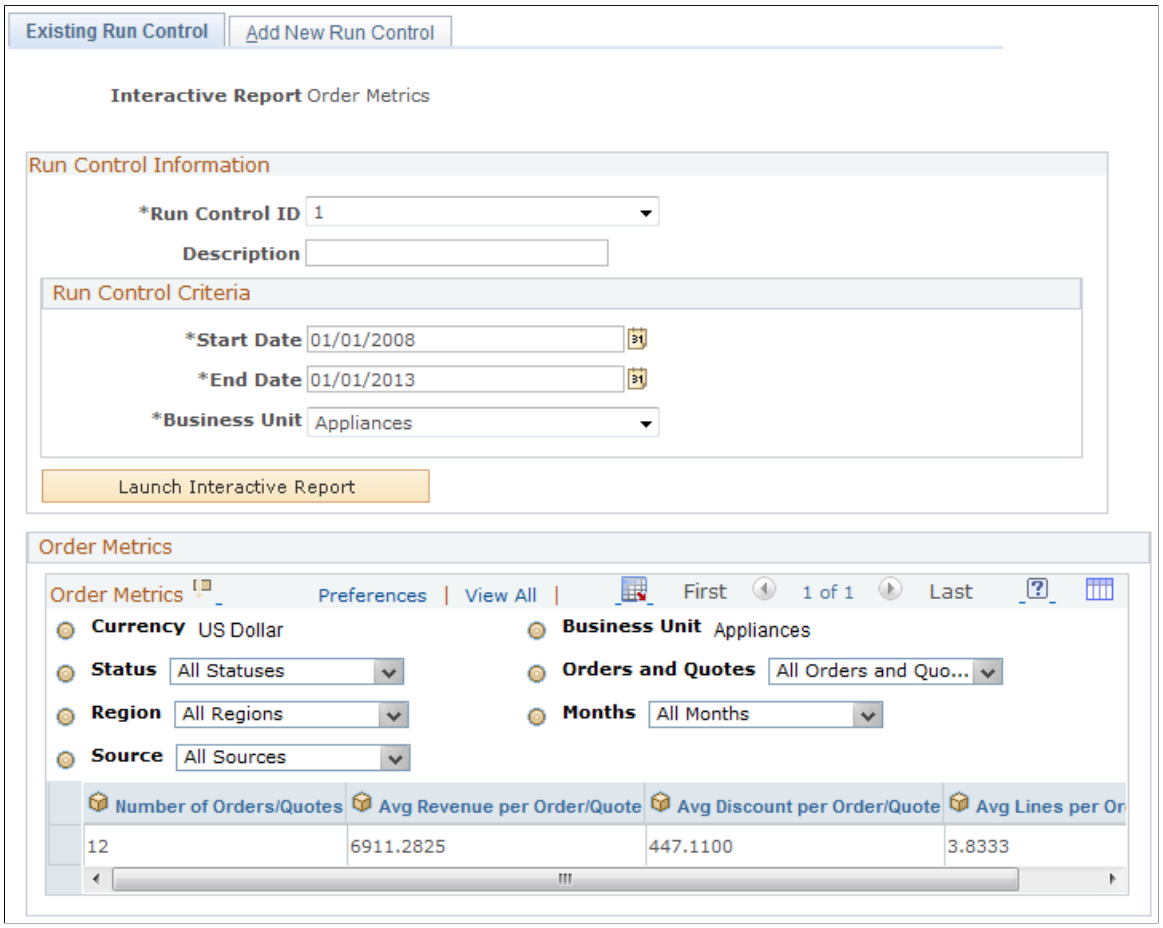
Navigation:

Orders and Quotes > **Interactive Reports** > **Order Metrics**

Select an existing run control or add a new run control for the Order Metrics interactive report. Click the Launch **Interactive Report** button on the Existing Run Control page.

Note: Use the run control criteria of *Start Date* and *End Date* to access this interactive report.

This example illustrates the fields and controls on the Existing Run Control - Order Metrics page.



Note: The following data elements (cubes) are common to both the Enterprise Order Metrics interactive report (for multiple business units) and Order Metrics interactive report (for a single business unit).

Field or Control	***Description***
Number of Orders/Quotes	Displays the total number of orders and quotes captured by the system for the dimensions currently selected.

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Field or Control	*Description*
Average Revenue per Order/Quote	Displays the average price of captured orders: the cumulative total revenue amount of all captures divided by the cumulative number of captures for the current dimensions.
Average Discount per Order/Quote	Displays the average discount applied to your orders. The average discount per capture is the cumulative total price minus the cumulative net price divided by the cumulative number of captures for the current dimensions.
Average Lines per Order/Quote	Displays the average lines per capture: the cumulative total of all capture lines divided by the cumulative number of captures for selected dimensions.

Existing Run Control - Enterprise Order Revenue Page

Use the Existing Run Control - Enterprise Order Revenue page (RO_BAM_REV_UPD) to launch the Enterprise Order Revenue interactive report.

You can select values and adjust dimensions to give an overall view of the enterprise. You can also view revenue information by business unit.

Navigation:

Orders and Quotes > **Interactive Reports** > **Enterprise Order Revenue**

Select an existing run control or add a new run control for the Enterprise Order Revenue interactive report. Click the Launch **Interactive Report** button on the Existing Run Control page.

Note: Use the run control criteria of *Start Date* and *End Date* to access this interactive report.

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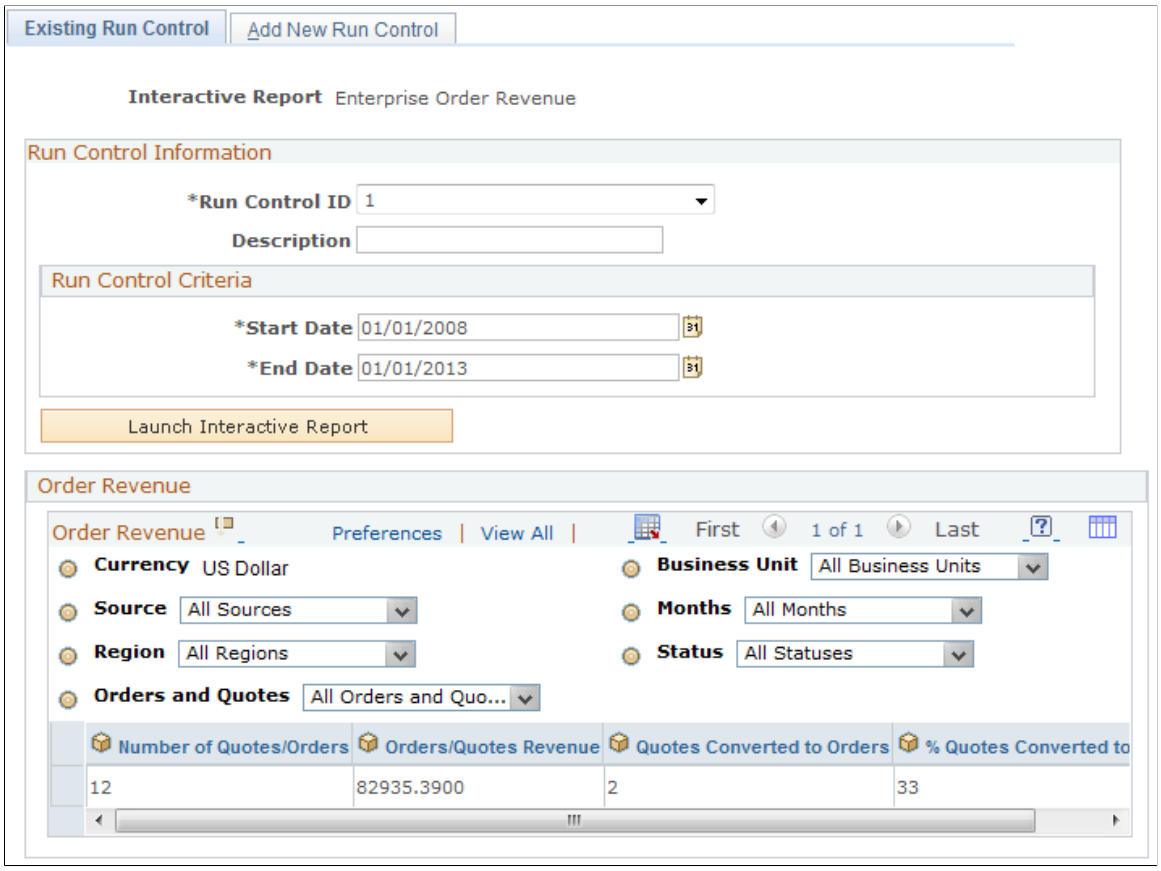
This example illustrates the fields and controls on the Existing Run Control - Enterprise Order Revenue page.



The Enterprise Order Revenue interactive report offers the same view as the Order Revenue interactive report, but the Enterprise Order Revenue interactive report shows the data across all business units.

Existing Run Control - Enterprise Order Metrics Page

Use the Existing Run Control - Enterprise Order Metrics page (RO_BAM_MET_UPD) to launch the Enterprise Order Metrics interactive report.

You can select values and adjust dimensions to give an overall view of the enterprise. You can also view metrics by business unit.

Navigation:

Orders and Quotes > **Interactive Reports** > **Enterprise Order Metrics**

Select an existing run control or add a new run control for the Enterprise Order Metrics interactive report. Click the Launch **Interactive Report** button on the Existing Run Control page.

Note: Use the run control criteria of *Start Date* and *End Date* to access this interactive report.

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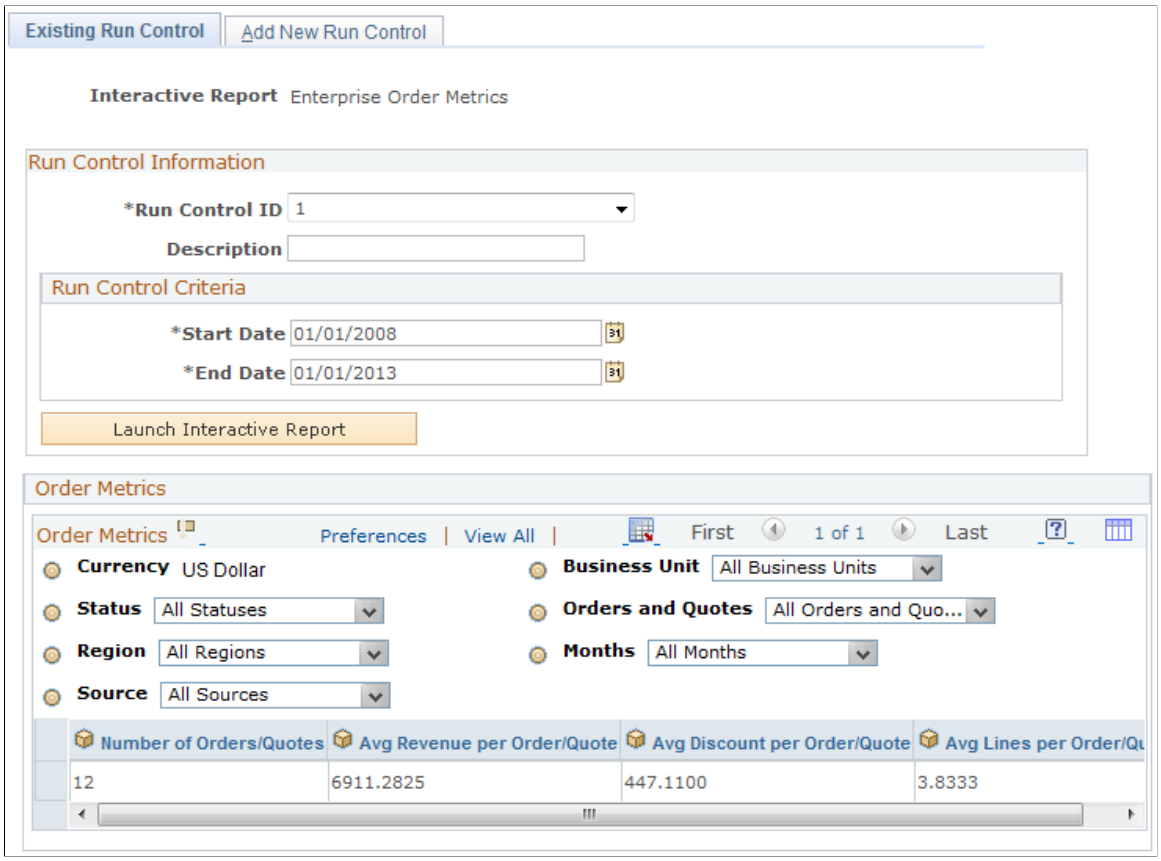
This example illustrates the fields and controls on the Existing Run Control - Enterprise Order Metrics page.



The Enterprise Order Metrics interactive report offers the same view as the Order Metrics interactive report, but the Enterprise Order Metrics interactive report shows the data across all business units.

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Chapter 13

Defining Order Capture Self-Service Business Units

Understanding PeopleSoft Business Units

A business unit is an operational subset of your organization. Each business unit has its own way of storing information and each business unit possesses its own processing guidelines. You can use one business unit for all cases, or you can divide your operations based on whatever criteria makes the most sense. For example, you could create business units for different product lines or regions.

Note: PeopleSoft implementation personnel can also help you define the appropriate business unit structure.

Define PeopleSoft business units in this order:

1. Define global PeopleSoft business units, if you run multiple PeopleSoft applications.
2. Define PeopleSoft Customer Relationship Management (PeopleSoft CRM) business units.
3. Define Order Capture Self-Service business units.
4. Link PeopleSoft business units and PeopleSoft CRM business units to Order Capture Self-Service.

Note: Before you create multiple Order Capture business units, be sure that you understand the concept of *TableSet controls,* the mechanism used to determine valid values for fields on transactional pages.

See *PeopleTools: Application Designer Developer's Guide*

Understanding Order Capture Self-Service Business Units

Order Capture Self Service business units provide the necessary defaults that enable self-service transactions, such as order creation and order tracking.

Note: Where applicable, business unit definition records must be synchronized across all systems. Business unit definitions created in PeopleSoft CRM are available in PeopleSoft Supply Chain Management. For fulfillment purposes, PeopleSoft Order Management and PeopleSoft Inventory business unit definitions must also be made available to PeopleSoft CRM. To synchronize business unit records across your business enterprise, use the business unit enterprise integration point.

Related Links

“Understanding Enterprise Integration Technology” (Business Object Management)

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Defining Order Capture Self-Service Business Units

This section discusses how to create an Order Capture Self-Service business unit.

Page Used to Define Order Capture Self-Service Business Units

Page Name	*Definition Name*	*Usage*
Order Capture Definition - Self Service Page	BUS_UNIT_RO2	Establish valid credit cards, carriers, ship to countries, and other business unit defaults for Order Capture Self-Service.

Related Links

Defining Order Capture Business Units

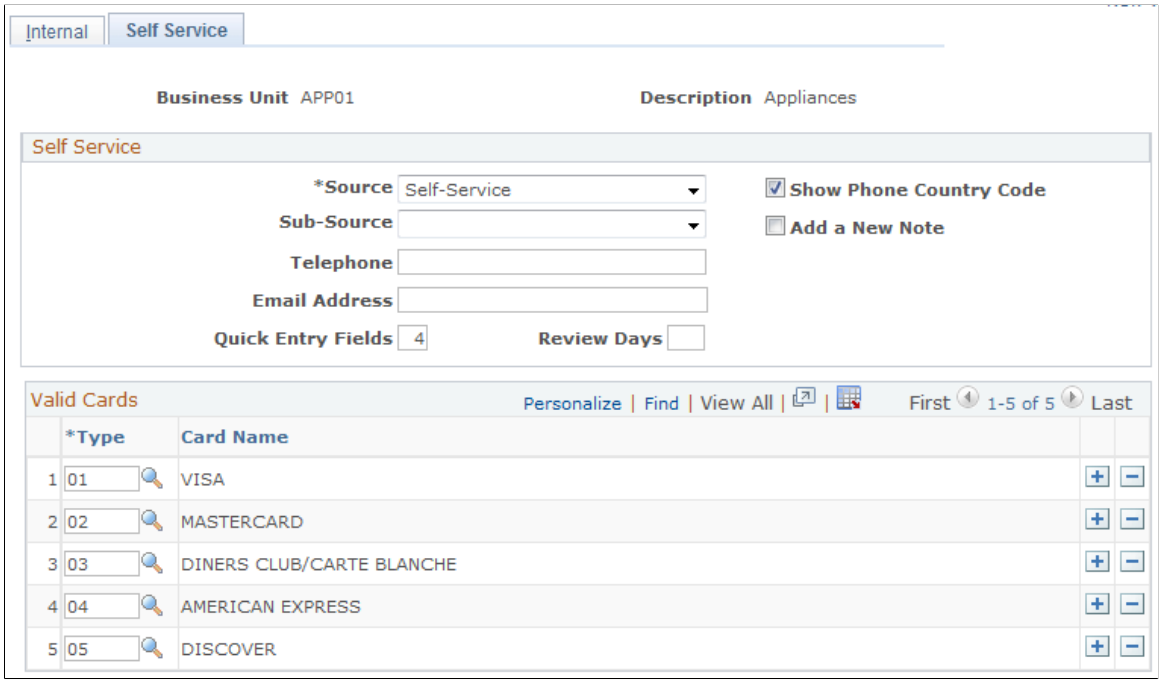
Order Capture Definition - Self Service Page

Use the Order Capture Definition - Self Service page (BUS_UNIT_RO2) to establish valid credit cards, carriers, ship to countries, and other business unit defaults for Order Capture Self-Service.

Navigation:

Set Up CRM > Business Unit Related > Order Capture Definition > Order Capture Definition - Self Service

This example illustrates the fields and controls on the Order Capture Definition - Self Service page (1 of 2).



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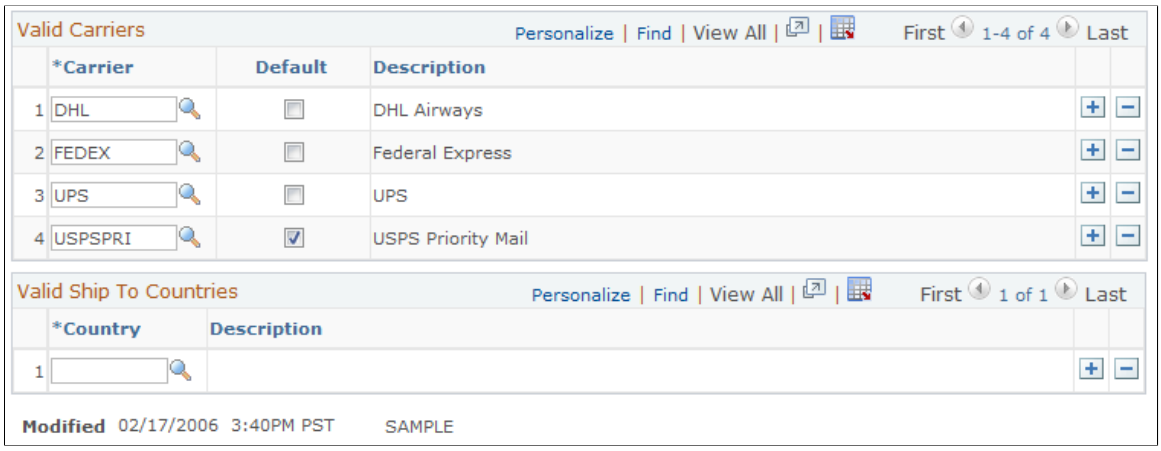
This example illustrates the fields and controls on the Order Capture Definition - Self Service page (2 of 2).



Use the Internal tab to create Order Capture business units to which you can associate the self-service options.

See Order Capture Definition - Internal Page.

Self Service

Field or Control	*Description*
Source	Enter a code that identifies the source of the order. Every order generated in Order Capture Self-Service contains the source code that you define here. **Note:** If you use both Order Capture and Order Capture Self-Service, this allows you to differentiate orders that were captured by way of the web channel from orders entered by a customer sales representative or sales representative within your organization.
Sub Source (default self service sub source)	Select a sub source code that further classifies the source of the order. The system makes sub source codes available based on the selected source code. See Capture Setup Tables - Sub Source Mapping Workbench Page.

Field or Control	*Description*
Telephone and **Email Address**	Enter a telephone number and email address. The default values entered here are displayed to users when viewing the status of their orders. For example, as a consequence, self-service users might see the following: "If you have questions, contact us at email@message.com or call us at 1 800 555 5252." **Note:** For credit card authorization purposes, CyberSource requires a telephone number and an email address. To guarantee processing, PeopleSoft CRM submits these defaults to CyberSource when an email or phone number was not defined for the person for whom an order was created.
Quick Entry Fields	Enter the number of blank rows available by default when users select the Quick Order Entry option.
Review Days	Enter the number of default days that you want to make viewable to users when they first view order and quote status.
Show Phone Country Code	Select this check box to display country codes in the phone numbers within the address book.
Add a New Note	Select this check box to be able to add notes and attachments to the order in Order Capture Self-Service. If you clear the check box, you are unable to add notes to the order.

Valid Cards, Valid Carriers, and Valid Ship To Countries

Define your valid credit cards, valid carriers, and valid ship to countries in the appropriate section on this page. Identify the default carrier in the Valid Carriers group box. Values will then be available for selection in the appropriate drop-down list box at runtime.

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Chapter 14

Setting Up Order Capture Self-Service

Understanding Order Capture Self-Service Setup

This topic provides a list of steps required to set up Order Capture Self Service. Most of these steps are also required for setting up Order Capture.

Once you have defined self-service business units, Order Capture Self-Service requires that you set up each of the following, in the order listed:

1. Products.

   See “Understanding Products in PeopleSoft CRM” (PeopleSoft Product and Item Management)

2. Pricing.

   See PeopleSoft Enterprise Pricer

3. Catalogs.

   See “Understanding Catalogs” (PeopleSoft Product and Item Management)

4. Order Capture Setup Workbench options.

   See Setting Up Order Capture Tables

5. Order Capture Type Workbench options.

   See Defining Order and Quote Processing

6. Order Capture Integration Workbench options.

   See Defining Integrations and Mappings

7. Carrier definitions.

   See Setting Up Freight Integration

8. Credit cards integration.

   See Setting Up Credit Card Integration

9. Tax provider options.

   See Defining Tax Installation Options

10. Consumer and business registration.

    See “Understanding Customer Self-Service Setup” (Application Fundamentals)

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11. Anonymous user access (guest user access).

    See “Implementing Self-Service Security” (Application Fundamentals)

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Chapter 15

Working With Order Capture Self Service

Understanding Order Capture Self Service

Order Capture Self Service delivers an intuitive interface that allows consumer users, company representatives, and brokers to easily create and manage the web channel. Order Capture Self Service synchronizes with Order Capture to allow self service users to track all orders, whether created by a customer service representative, an agent through the call center, or by themselves through the web.

Order Capture Self Service works in conjunction with the following CRM features, some of which are common to all self service applications, and others that specifically complement Order Capture Self Service:

- Security elements, including definition of user roles and associated permissions.
- Address book.
- Sign in.
- Registration.
- Profile maintenance.
- Contact Us and Chat.
- Attributes.
- Product catalog.
- Search Catalog.

Note: Functionality that is common to both Order Capture and Order Capture Self Service, such as integration with order fulfillment, pricing, freight, and tax integration, is documented in previous topics of this product documentation.

Understanding Order Capture Self-Service Setup

Once you have Defining Order Capture Self-Service Business Units, Order Capture Self-Service requires that you set up each of the following, in the order listed:

- Products.
- Pricing.
- Catalogs.
- Order Capture Setup Workbench options.

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- Order Capture Type Workbench options.
- Order Capture Integration Workbench options.
- Carrier definitions.
- Credit cards.
- Tax provider options.
- Consumer and business registration.
- Anonymous user access (guest user access).

Since most of this involves setting up options that are also required for Order Capture, refer to the following related links for more information.

Related Links

"Understanding Product Definitional Elements" (PeopleSoft Product and Item Management)
"Understanding Catalogs" (PeopleSoft Product and Item Management)
Setting Up Order Capture Tables
Defining Order and Quote Processing
Defining Integrations and Mappings
Understanding Freight Integration Setup
Understanding Credit Card Integration
Understanding Tax Installation Options Setup
"Understanding Customer Self-Service" (Application Fundamentals)
"Implementing Self-Service Security" (Application Fundamentals)

Understanding Delivered User ID, User Role Identification, and Password Creation

This table shows the users and roles that Order Capture Self Service delivers. You can adopt these particular users and roles, or you can modify them to better suit your business needs.

Note: To modify permissions for these delivered user roles, navigate to **PeopleTools** > **Security** > **Permissions & Roles** > **Roles**.

User ID	*Role Name*	*Role Description*	*Access*
GUEST	Guest	An anonymous user that accesses the web channel.	Guests have access to the Sign In, Product Registration, Find Products, and Shopping Cart pages.

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User ID	*Role Name*	*Role Description*	*Access*
CPSS, CPSS2	Consumer	A consumer that represents him- or herself.	Consumers have guest privileges without the sign-in (and registration) options. They also have access to the Customer Care, Order Status, Quote Status, Profile Maintenance, and Contact Us pages.
CPCUST, CPCUST2	Customer	A customer represents a single customer.	Customers have all consumer privileges as well as quick entry privileges.
CPBRKR, CPBRKR2	Broker	A broker represents multiple customers.	Brokers have all customer privileges plus customer selection privileges. Customer selection privileges allow brokers to select the customer that they want to represent for a particular session.

Note: User IDs that end with a *2* are associated with the *CRM01* setID.

Setting Password Expiration and Changing Passwords

To set the internal self-service password expiration date to one other than the external date, navigate to **Set Up CRM** > **Security** > **Self-Service** > **User Registration**.

The password expiration options are accessed in the Password Security Policies group box of the User Registration page. The options enable you to setup your password expiration policy. For example, the internal passwords might be set to expire every 60 days while the setting for the external passwords might be set to never expire. In the Password Security Policies group box a password can be set to never expire by selecting the Password **Never Expires** radio button, or the password can be set to expire by selecting the Password Expires radio button and entering the number of days until expiration in the associated field. A password expiration date is calculated based on the last password change date as determined from the tools PSOPRDEFN table.

When the password expires and you click the **Sign In** button on the Sign In page, you are presented with the Change Password page. Here you enter your old password, your new password and enter the new password again to confirm it. Click the Save button or if it becomes necessary, you can cancel and return to the sign in page.

Self-Service Pages

Order Capture Self Service delivers these customer-facing pages for self-service order creation and management. They are enabled by the Order Capture Self Service product as part of the PeopleSoft CRM Portal Pack:

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- Find Products page (RX_PROD_SRCH)
- Shopping Cart page (RE_CART)
- Order Status page (RE_ORDER_SRCH)
- Quote Status page (RE_QUOTE_SRCH)
- Contact Us (WC_CONTACT_US)
- Product Registration page (RF_PROD_REG_SRCH)

Selecting Products

This section discusses how to select products, view product details and compare products.

Note: The navigation paths for pages that are discussed in this section are valid only in the self-service application.

Pages Used to Select Products

Page Name	*Definition Name*	*Usage*
Find Products Page	RX_PROD_SRCH	Search a particular catalog or browse all catalogs, get advice on products.
Browse Catalog Page	RB_CATALOG	View and select a product.
Product Detail Page	RB_PROD_DTL	View product details, select a quantity, change units of measure, and add the product to the shopping cart.
Product Comparison Page	RB_CATALOG	Compare as many as three products. Some functionality for the Compare Pad will differ based on your installation.

Find Products Page

Use the Find Products page (RX_PROD_SRCH) to search a particular catalog or browse all catalogs, get advice on products.

Navigation:

Find Products > **Find Products**

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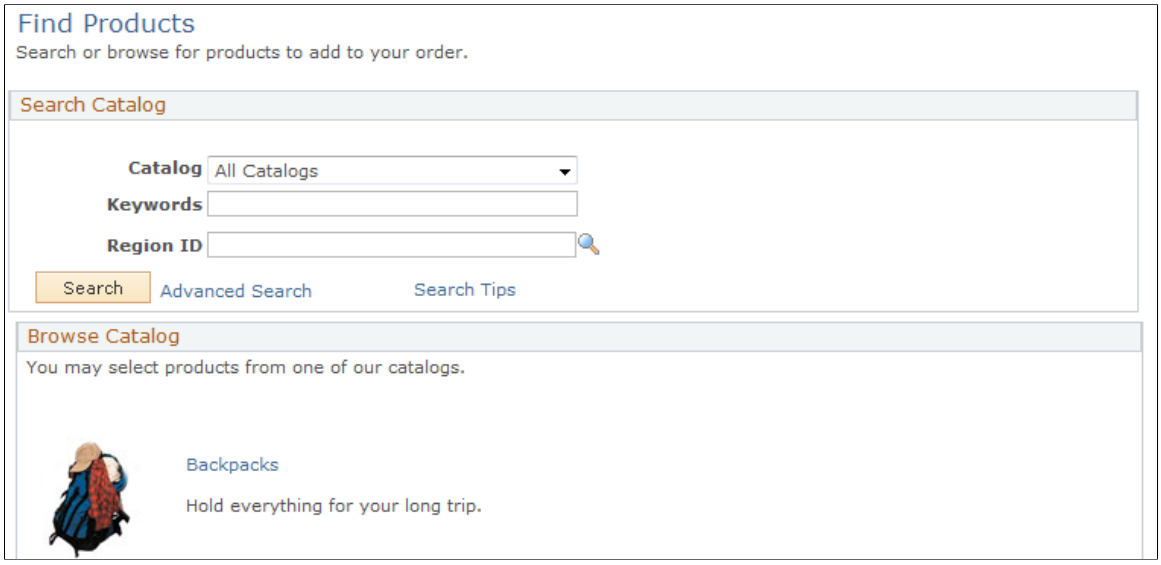
This example illustrates the fields and controls on the Find Products page.



This page provides several methods to find products.

- The system can display recommended products based on your prior ordering activity.
- Select and search a particular catalog. When you have enough information to provide definitive search criteria, use the Advanced Search link to search on keys such as keywords, brand name, description, and product ID.
- Select catalog links to browse listed catalogs.

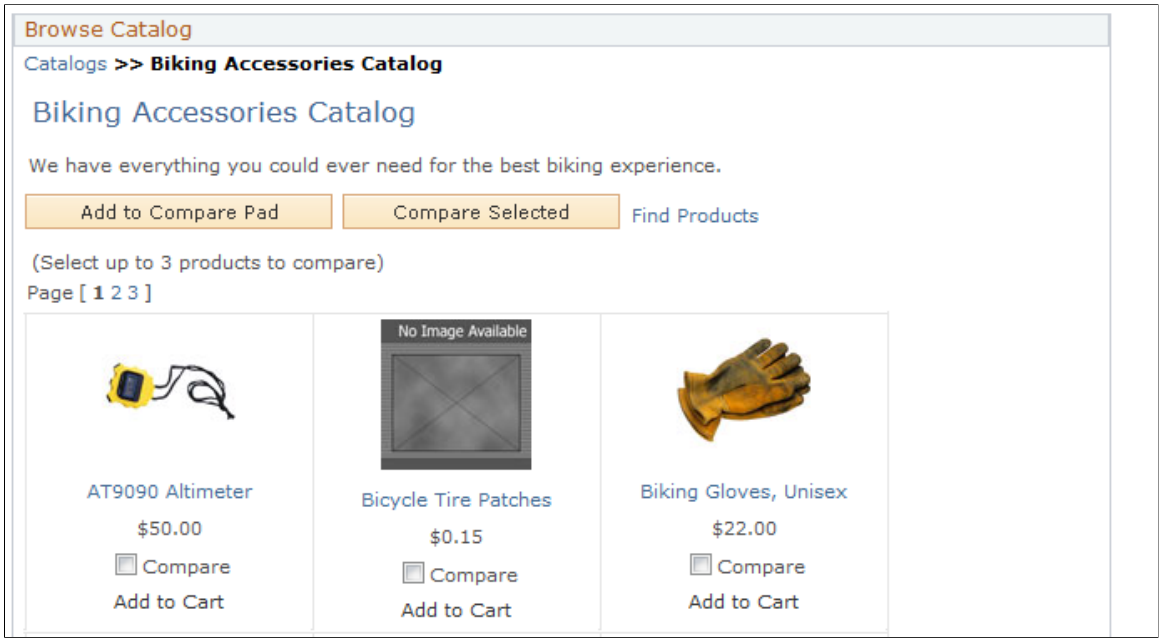
Browse Catalog Page

Use the Browse Catalog page (RB_CATALOG) to view and select a product.

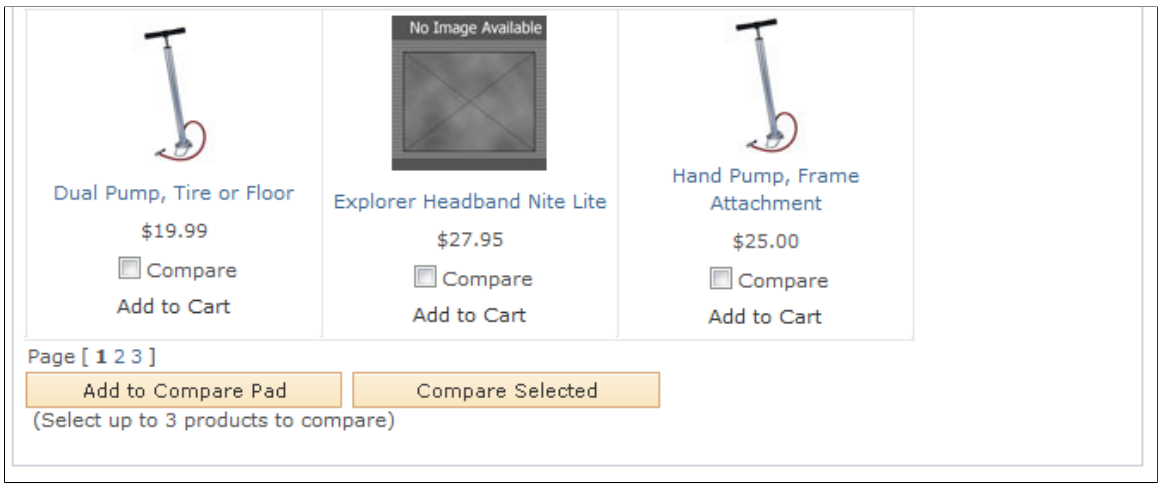
Navigation:

Click a catalog link on the Find Products page.

This example illustrates the fields and controls on the Browse Catalog page (1 of 2).



This example illustrates the fields and controls on the Browse Catalog page (2 of 2).



Field or Control	***Description***
Recommended Product	The system can highlight various products and distinguish them as recommended products in the various catalogs. However, you can click any product link to access its Product Details page. For example, if you click the biking gloves product link, you can access the Product Details page for this product to view the product description.
Compare	Select check boxes for up to three products for product comparison.

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Field or Control	*Description*
Add to Compare Pad	Click to add the selected products awaiting to be compared.
Compare Selected	Click to display the attributes of up to three products side-by-side in the compare pad. The compare pad content is determined by a display template that is set up for the product catalogs. Some functionality for the Compare Pad will differ based on your installation.

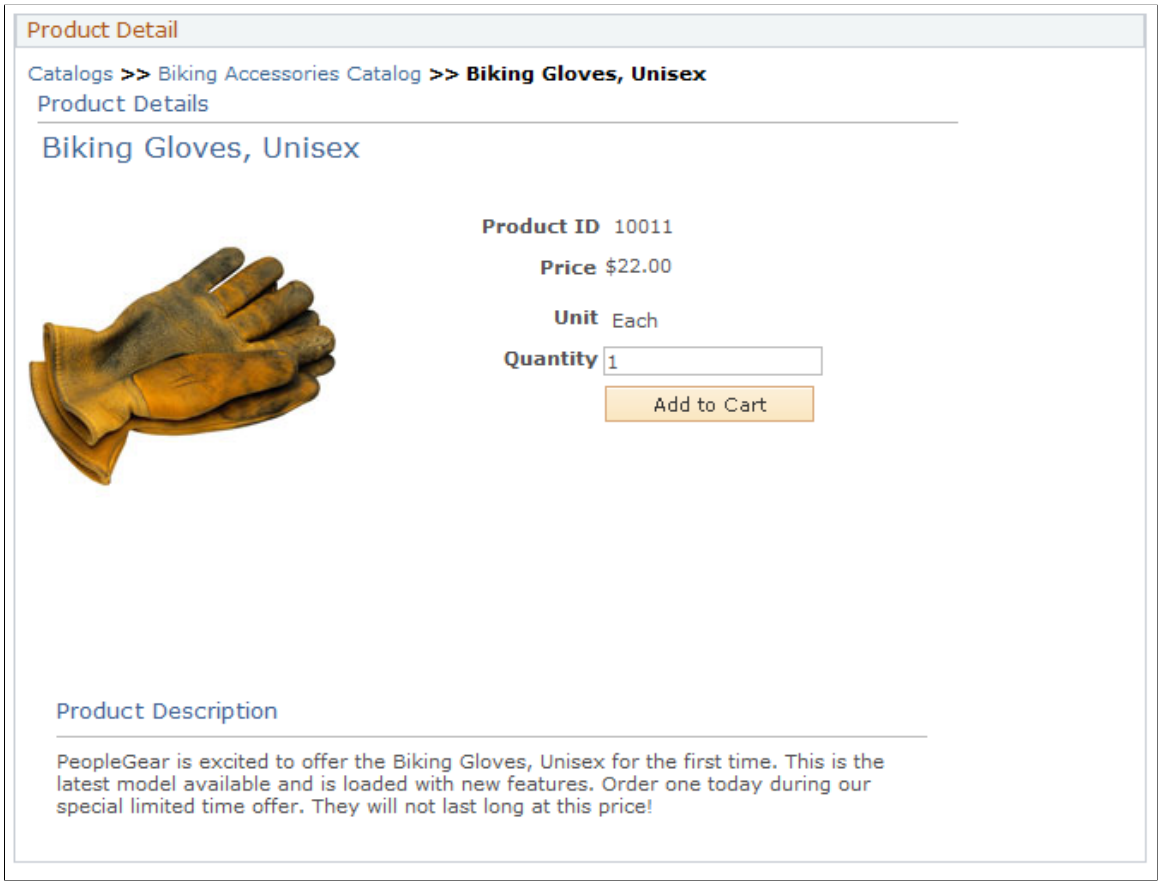
Product Detail Page

Use the Product Details page (RB_PROD_DTL) to view product details, select a quantity, change units of measure, and add the product to the shopping cart.

Navigation:

Click a product link on the Browse Catalog page.

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



Field or Control	*Description*
Add to Cart	Add the product to your shopping cart.
The next step up from this product	Select this link, if available, to display products that are considered a step up from the product you are currently considering—perhaps for quality, size, or capacity.

Note: You can access Product Details from several pages, including the Catalog, Shopping Cart, Checkout, and Order/Quote Status pages.

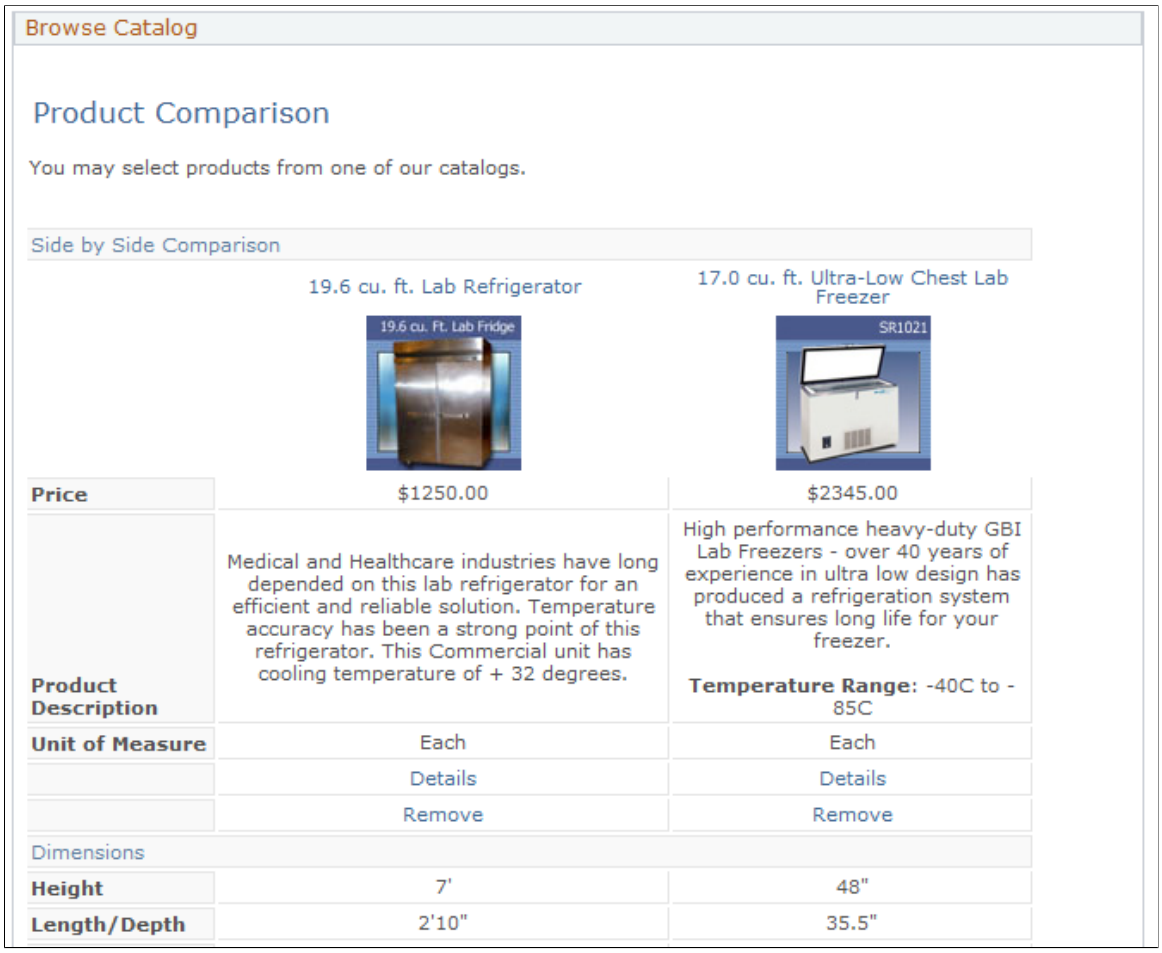
Product Comparison Page

Use the Product Comparison page (RB_CATALOG) to compare as many as three products.

Navigation:

On the Browse Catalog page, select the **Compare** check box of up to three products. Click the **Add to Compare Pad** button and then the **Compared Selected** button.

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



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Field or Control	*Description*
Details	Click to access the Product Details page to view the product's description and additional details.
Remove	Click to remove a product from the current comparison. In order to facilitate cross catalog comparisons, products stay on the compare pad until they are removed.
Return to Catalog	Click to return to the catalog to add additional products to the comparison. The compare pad can display up to three products in a comparison. Remove any products that should no longer be compared.

Using the Quick Order Entry

This section provides an overview of the quick order entry and discusses how to add products to orders quickly.

Page Used to Add Products to Orders Quickly

Page Name	*Definition Name*	*Usage*
Quick Order Entry Page	RE_QUICK_ENTRY	Create orders or quotes rapidly when you are familiar with the product and already know the product ID.

Understanding the Quick Order Entry

There are two ways to add products to the shopping cart: from the Product Details page or from the Quick Order Entry page. The Quick Order Entry page is intended for users who are familiar with the products and the product IDs that they order; it delivers a simple form to support speedy entry of product information.

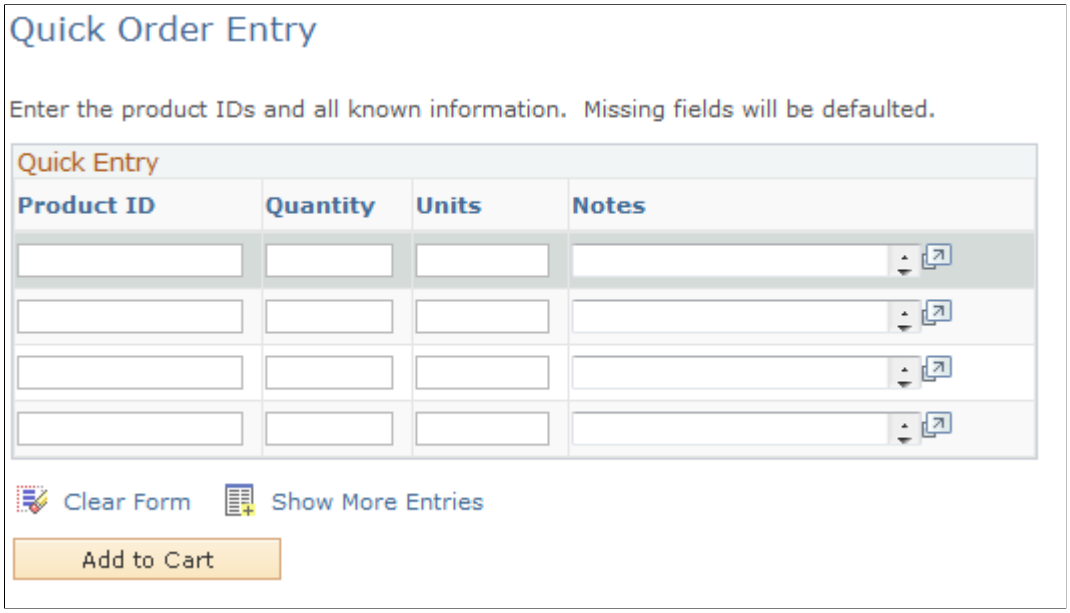
Quick Order Entry Page

Use the Quick Order Entry page (RE_QUICK_ENTRY) to create orders or quotes rapidly when you are familiar with the product and already know the product ID.

Navigation:

Quick Order Entry > **Quick Order Entry**

This example illustrates the fields and controls on the Quick Order Entry page.



Field or Control	*Description*
Product ID	Enter the product ID.
Quantity	Enter a quantity. If you do not select a quantity, the system assigns the default quantity *1*.
Units	Enter either the unit of measurement (UOM) code (such as *ea.*) or the UOM description (such as *each*).
Notes	Add notes, which appear for the specified product when you access the shopping cart.

Using the Shopping Cart

This section provides an overview of the shopping cart and discusses how to work from within the shopping cart.

Page Used to Access the Shopping Cart

Page Name	*Definition Name*	*Usage*
Shopping Cart Page	RE_CART	View the contents of the shopping cart, and then proceed to checkout.

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Understanding the Shopping Cart

The shopping cart displays all of the products that you select for an order or quote. You can perform these operations from the Shopping Cart page:

- Update quantity and recalculate price.
- Configure products or packages.
- Remove products.
- Proceed to checkout.

Shopping Cart Page

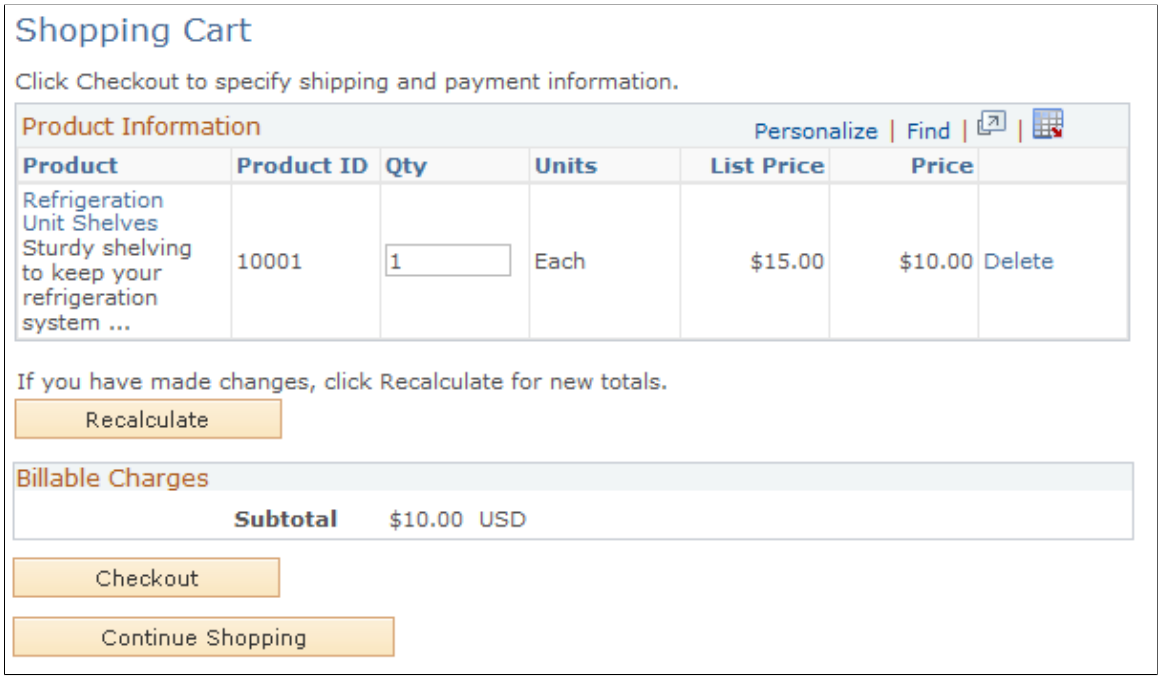
Use the Shopping Cart page (RE_CART) to view the contents of the shopping cart, and then proceed to checkout.

Navigation:

- **Shopping Cart** > **Shopping Cart**
- Click the **Add to Cart** button after adding products on the Quick Order Entry page.
- **Find Products** > **Find Products**

  Select a catalog on the Find Products page and then select products on the Browse Catalog page. Click the **Add to Cart** button.
- Click the **Change Order** link on the Checkout - Shipping and Payment page.

This example illustrates the fields and controls on the Shopping Cart page.



Click the product's name to view product details.

Field or Control	*Description*
Qty (quantity)	Update the quantity of a product. Click the **Recalculate** button to determine new total charges.
Delete	Click this link to remove the line item from the shopping cart. Click the **Recalculate** button to determine new total charges.
	Click to select options for a product that is set up as a dynamic package with various options that you must choose, such as when a product must be custom-built. When you have configured the product with its various options, the system calculates a composite price. This icon is not available or applicable to all products. See “Defining Product Packages” (PeopleSoft Product and Item Management).
Recalculate	Click to update the price after changes to your selections, such as increasing or reducing the quantity of a product or after removing a product.
Checkout	Proceed to checkout.
Continue Shopping	Return to the catalog to select additional or different products. When you click the Continue Shopping button, the system retains the contents of your shopping cart.

Note: When you have a product package in the shopping cart, it must be configured before you proceed to checkout. If a product has required attributes, you must specify the attribute value before you can proceed to checkout.

Managing Checkout

This section discusses how to manage shipping, product, and payment options from the Checkout page.

Pages Used to Manage Checkout

Page Name	*Definition Name*	*Usage*
Checkout - Shipping and Payment Page	RE_SUMMARY	Enter and modify shipping, product, and payment information. CRM Portal Pack must be installed to display the Checkout page.

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Page Name	*Definition Name*	*Usage*
Multiple Shipments Page	RE_DESTINATION	Create more than one shipment destination for the order. This button appears if you have more than one line in the Product Information section.
Checkout - Notes & Attachments Page	RE_NOTE_SUMMARY	Displays a list of notes and attachments associated with the order.
Attributes Page	RE_ATTR_RUNTIME	Enter product attributes where attributes are allowed for a product.
Order Confirmation Page or Quote Confirmation Page	RE_STATUS	Send the completed order or quote to the enterprise system for processing and, in the case of an order, fulfillment. The system displays a confirmation message if the submission is successful.
Order Change Page	RX_PROCEED_CONFIRM	Change an order that was derived from a quote. When you change an order, all special pricing for quotes is lost.

Checkout - Shipping and Payment Page

Use the Checkout - Shipping and Payment page (RE_SUMMARY) to enter and modify shipping, product, and payment information.

CRM Portal Pack must be installed to display the Checkout page.

Navigation:

Click the **Checkout** button on the Shopping Cart page.

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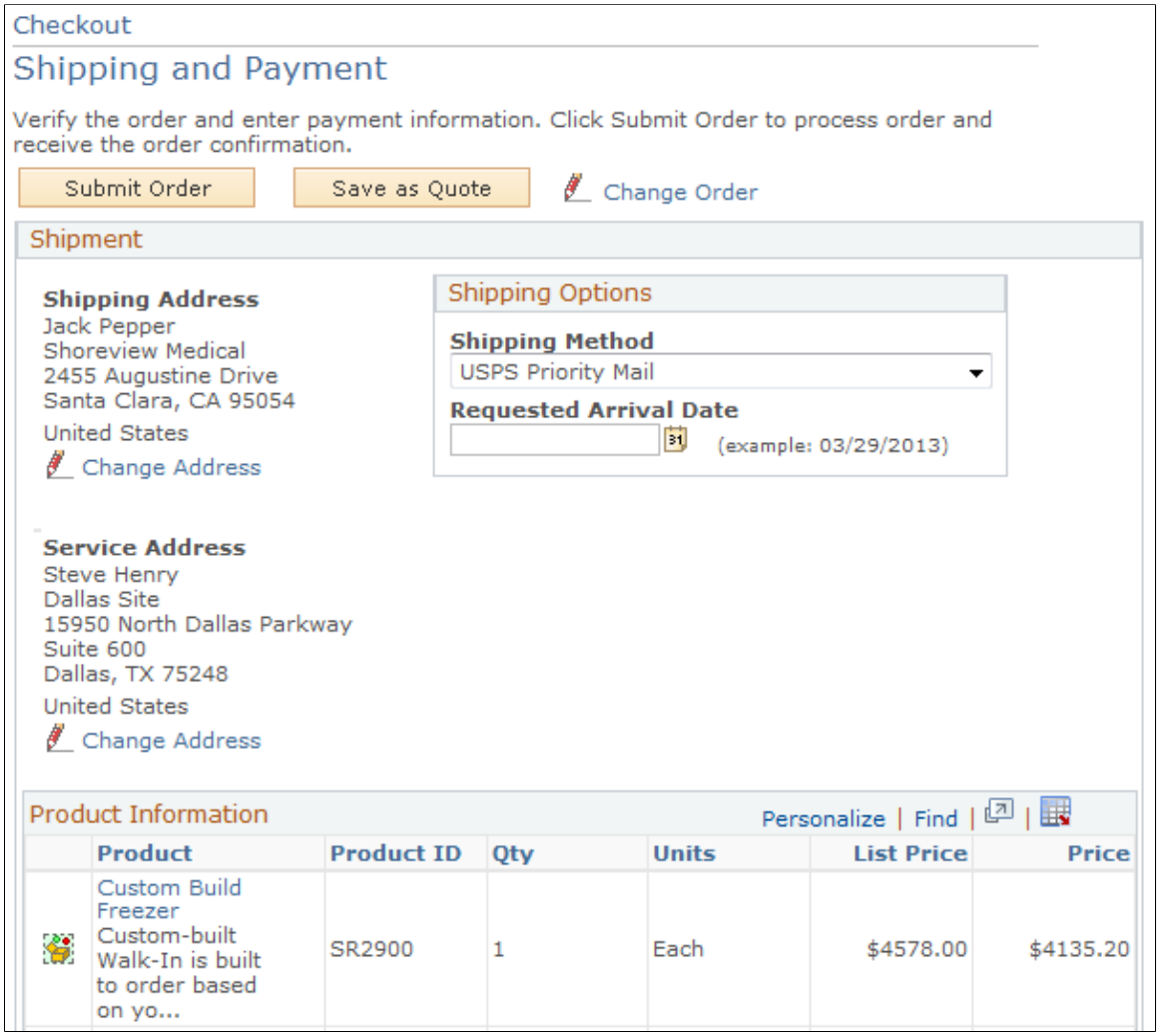
This example illustrates the fields and controls on the Checkout - Shipping and Payment page (1 of 4).



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This example illustrates the fields and controls on the Checkout - Shipping and Payment page (2 of 4).

	Freezer Shelves These shelves are compatible with all of our walk-...	10019	1	Each		$89.10
	GBI IntelliAIRE Thermostat The GBI IntelliAIRE is an advanced microprocessor-...	10020	1	Each		$130.50
	Replacement Compressor Replacement Compressor for Walk In Freezers....	10022	1	Each		$195.00
	Freezer Door Options Custom Freezer Door Specs...	SR05001	1	Each		$0.00
	Freezer Door 26in x78in Freezer Door 26in x78in...	SR2200	1	Each		$2134.80
	Freezer Footprint Options	SR2050	1	Each		$0.00
	Custom Freezer Footprint 5'10" Freezer Footprint 5'10"x5'10"...	SR2951	1	Each		$1585.80

This example illustrates the fields and controls on the Checkout - Shipping and Payment page (3 of 4).

Total Charges

Billable Charges

Subtotal	$4135.20	USD
Discount	$0.00	USD
Surcharge	$0.00	USD

Total	$4135.20	USD

If you have made changes, click Recalculate for new totals.

Recalculate

Invoice Payment Info

You may enter a PO number below for your own tracking purposes.

Customer PO

Payment Terms Due Immediately

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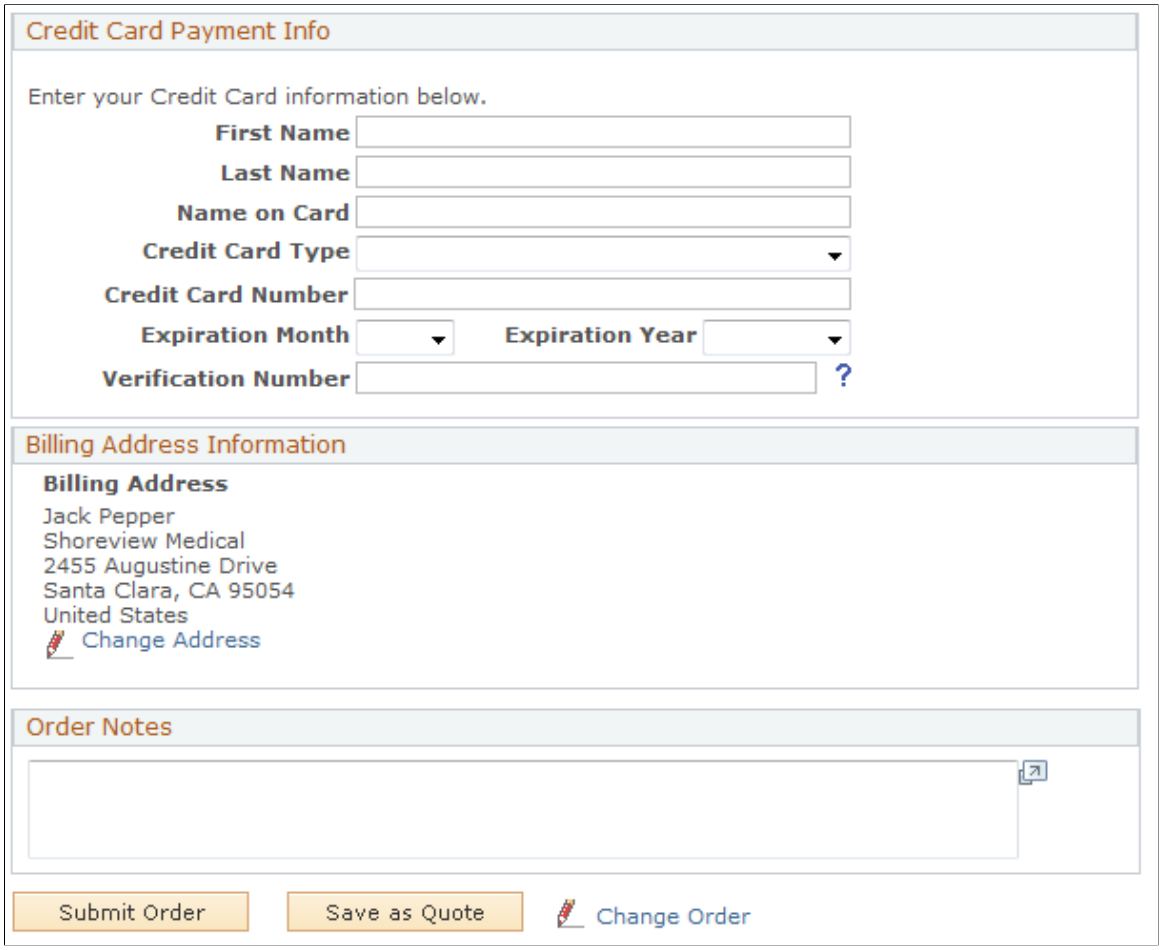
This example illustrates the fields and controls on the Checkout - Shipping and Payment page (4 of 4).



Field or Control	*Description*
Submit Order	Click to submit the order for processing. You receive an order confirmation.
Save as Quote	Click to save as a quote. You receive a quote confirmation.
Change Order	Click to return to the shopping cart and make changes.

Shipment

This section lists the default shipping address of the self-service user. You can select another existing shipping address or create a new one for the order.

Field or Control	*Description*
Change Address	Click the link to add new or select another shipping address.

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Field or Control	*Description*
Multiple Shipments	Click to access the Multiple Shipments page and send the products contained in the order to different locations or by way of different shipping methods. This assumes that there is more than one product. To create multiple shipments for the same product, enter the product and appropriate quantity into the cart twice.

Shipping Options

Field or Control	*Description*
Shipping Method	Choose a preferred carrier from the drop-down list. Valid shipping methods are specified on the Self Service page at the business unit level.
Requested Arrival Date	Enter a date you wish the shipment to arrive, if applicable. This field is optional.
Single Shipment	Select to prevent partial shipments of this order.
Ship as Items Available	Select to allow partial shipments. **Note:** Partial shipments may increase freight charges.

Product Information

This section lists the products that are added to the order. Click a product link to view product details. On the Product Details page, you can change quantity or view or configure a product package, or view and change attributes for a product with attributes.

Total Charges

This section lists the current billable charges of the order. If you add or remove products from the order and you want to make sure that the charges are updated, click the **Recalculate** button to refresh the total charge of the order.

Invoice Payment Info and Credit Card Payment Info

A self-service user can decide which of the available payment methods to use for the order. The system determines the different payment methods that are available to the user based on the defined customer as well as the preferred payment method that is established on the customer's or consumer's record.

Enter a customer purchase order number if you are paying by invoice. Enter credit card information if you plan to pay by credit card.

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Note: A self service user is required to enter either the invoice or the credit card information each time an order is placed. After the order is submitted, the payment information, together with other order-specific information, is viewable in the Order Status component.

Field or Control	*Description*
Verification Number	Enter the credit card verification number. This field becomes required if the **Credit Card Verification Number Required** option is selected on the General Options page. After the order is saved, the verification number is masked and unavailable for review. This number is deleted automatically from the system after the authorization of the credit card transaction is completed (passed or failed).
? (what's a verification number)	Click to see an example of where a verification number can be found on a credit card.

Billing Address Information

This section lists the default billing address of the self-service user. You can select another existing billing address or create a new one for the order by clicking the **Change Address** link.

Order Note

This section lets you enter any note you want to add for the corresponding order.

Multiple Shipments Page

Use the Multiple Shipments page (RE_DESTINATION) to create more than one shipment destination for the order.

Navigation:

Click the **Multiple Shipments** button on the Checkout - Shipping and Payment page.

If there are two or more order lines in the shopping cart, you can divide shipments.

To divide shipments:

1. Select the product that you want to designate for a separate shipment on the Multiple Shipments page.
2. Click the **New Shipment** button to request a new shipment.

Note: You cannot split a single line consisting of more than one quantity of a single item into two shipments. Also, you cannot ship components of a single package separately.

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Accessing and Changing Product Attributes

Access the Attributes page (click the **Attributes** link of a product line (if available) on the Checkout - Shipping and Payment page).

If available for that product, access the Attributes page by clicking on the Attributes icon next to a product.

Fields on the Attributes page are dynamic. You define the attributes that are necessary for the products that you sell. Attributes are an optional feature. Attribute groups allow you to associate a different set of attributes to different sets of products.

Related Links

"Product Definition - Attributes Page" (PeopleSoft Product and Item Management)

Order Confirmation Page or Quote Confirmation Page

Use the Order Confirmation page or Quote Confirmation page (RE_STATUS) to send the completed order or quote to the enterprise system for processing and, in the case of an order, fulfillment.

The system displays a confirmation message if the submission is successful.

Navigation:

Click the **Submit Order** button or the **Save as Quote** button on the Checkout - Shipping and Payment page.

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This example illustrates the fields and controls on the Order Confirmation page (1 of 2).

Order Confirmation

Deatils

Order ID OC00699 **Status** Submitted

Shipment

Shipping Address
Jack Pepper
Shoreview Medical
2455 Augustine Drive
Santa Clara, CA 95054
United States

Service Address
Steve Henry
Dallas Site
15950 North Dallas Parkway
Suite 600
Dallas, TX 75248
United States

Shipping Options

Shipping Method
USPS Priority Mail

Product Information

Personalize | Find |

	Product	Product ID	Qty	Units	List Price	Price
	Custom Build Freezer Custom-built Walk-In is built to order based on yo...	SR2900	1	Each	$4578.00	$4135.20
	Freezer Shelves These shelves are compatible with all of our walk-...	10019	1	Each		$89.10

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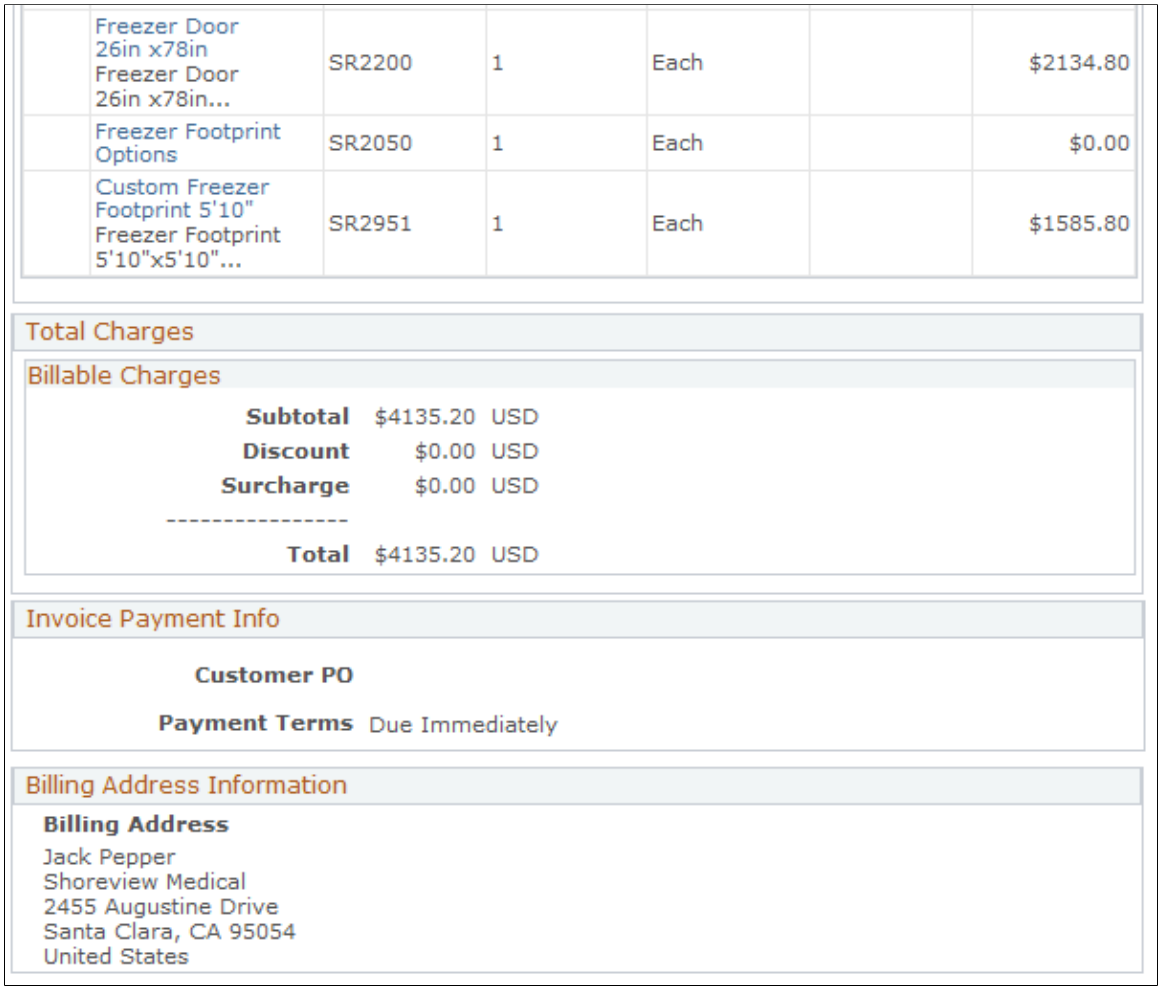
This example illustrates the fields and controls on the Order Confirmation page (2 of 2).



Field or Control	*Description*
Notes and Attachments Summary	Click to view any notes and attachments that are created for the corresponding quote.
Product Information	Click the product link to return to the Product Detail page where you can click the **Order Again** button to place another order or click the**Return to Order Status** button to access the Order Details page again.

Viewing Order or Quote Status

This section discusses how to search for orders and quotes.

Pages Used to View Order or Quote Status

Page Name	*Definition Name*	*Usage*
Order Status Page	RE_ORD_SEARCH	Search for orders in the system.
Order Status - Order Details Page	RE_STATUS	View line information for orders. You can also copy this order to the shopping cart.
Quote Status Page	RE_QUO_SEARCH	Search for quotes in the system.
Quote Status - Quote Details Page	RE_STATUS	View line information for quotes. You can also convert this quote to an order.

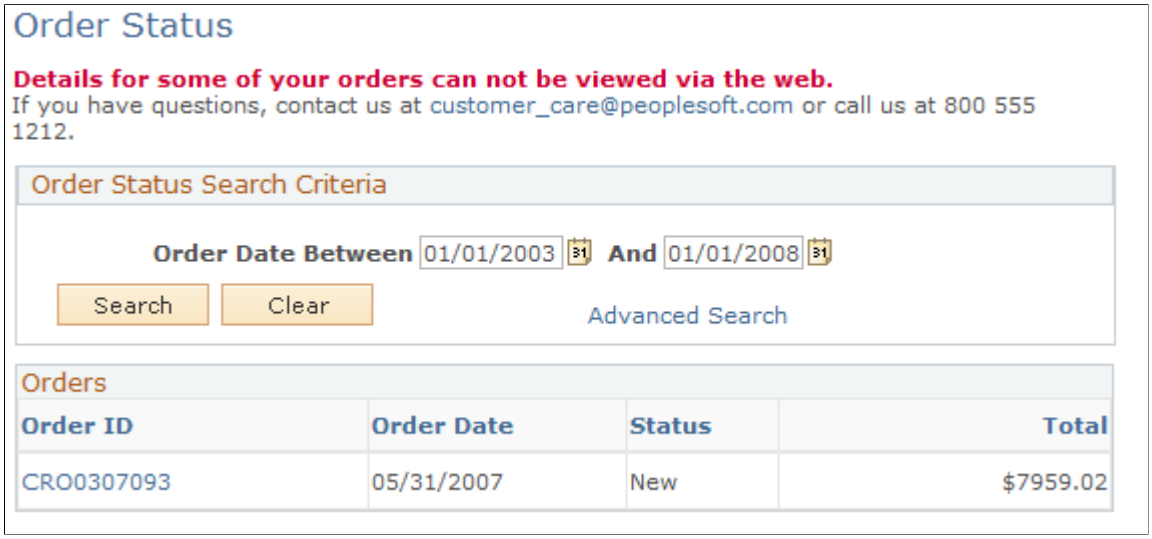
Order Status Page

Use the Order Status page (RE_ORD_SEARCH) to search for orders in the system.

Navigation:

Order Status > **Order Status**

This example illustrates the fields and controls on the Order Status page.



Note: Either the Order Status or the Quote Status page becomes available when you click the **Advanced Search** link.

Contact Us information is associated with the business unit. You can modify it or remove it from display during setup.

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Field or Control	*Description*
Search	Click to search by date.
Advanced Search	Click the Advanced Search link to search for orders by date, order ID, customer PO, and order status.
Order Status	Search for orders using advanced search by entering one of these order status conditions: • Cancelled • Complete • Expired • Generating **Note:** This status indicates that the Business Project is in the process of creating the individual orders. Only a *primary* bulk order can have this status. • Hold • In Fulfillment **Note:** *In Fulfillment* status indicates an order that is being processed to be shipped or provisioned. • New • Partial Hold • Submitted
Order ID	Click the order link to access the Order Details page.

Order Status - Order Details Page

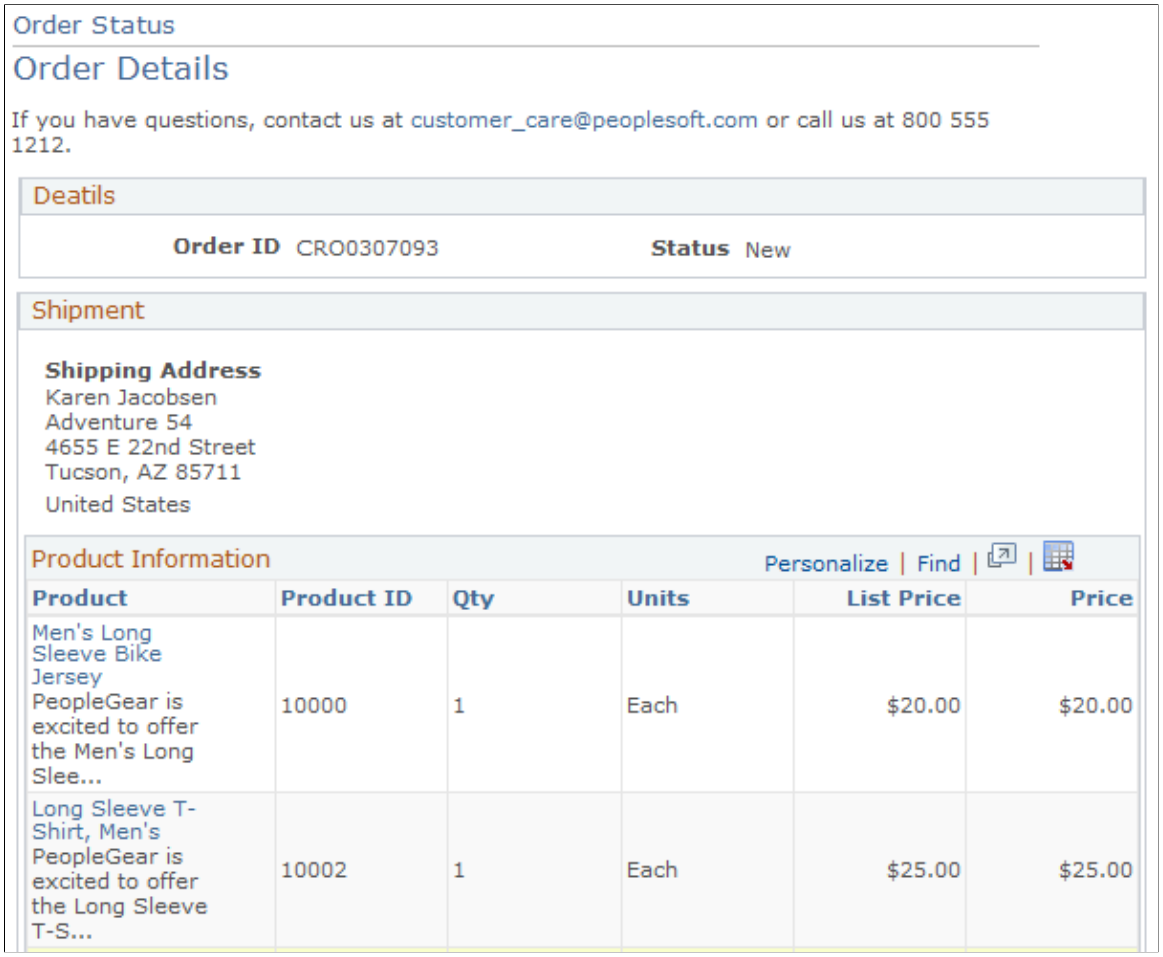
Use the Order Status - Order Details page (RE_STATUS) to view line information for orders.

You can also copy this order to the shopping cart.

Navigation:

Click an order link on the Order Status page.

This example illustrates the fields and controls on the Order Status - Order Details page.



Note: To view order details for orders that originated externally, an external link must be defined on the Order Capture Setup Workbench.

Field or Control	*Description*
Order ID	Displays the PeopleSoft Order number or quote number.
Status	Displays the current status of the order or quote.
Shipment	Displays shipment information and links for tracking orders. When you click the **Track Shipment** link, you transfer to the shipment provider, where you can view the status of your packages. **Note:** Information is available only for orders that have a shipment and a PRO_NUMBER defined to a web site, such as for United Parcel Service (UPS) or Federal Express (FEDEX).

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Field or Control	*Description*
Product	Click the product link to view product details. **Note:** Depending on the fulfillment system with which your system integrates, products or packages within packages may display their statuses individually and not as a package.
Order Again	Click to copy this order to the shopping cart. **Note:** Your original order does not change.

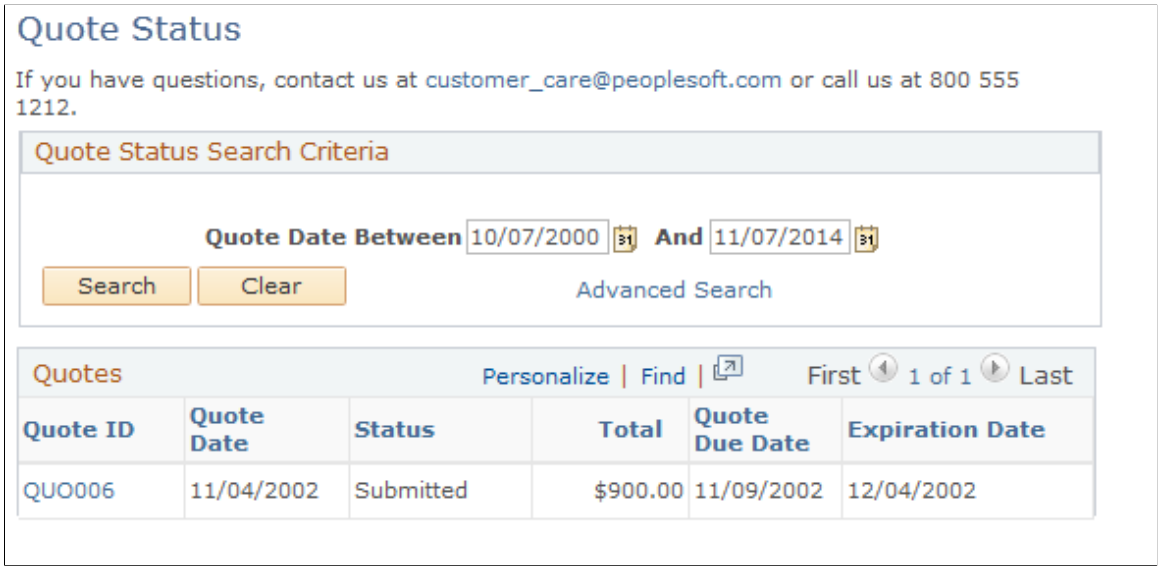
Quote Status Page

Use the Quote Status page (RE_QUO_SEARCH) to search for quotes in the system.

Navigation:

Quote Status > **Quote Status**

This example illustrates the fields and controls on the Quote Status page.



Field or Control	*Description*
Quote Due Date	Displays the date on which the quote must be captured before the quote automatically expires.
Expiration Date	Displays the date after which the quote is no longer valid.

Note: Advanced search criteria for *quote* status are slightly different from advanced search criteria for *order* status in that the criteria can entail quote due date and expiration date parameters.

Quote Status - Quote Details Page

Use the Quote Status - Quote Details page (RE_STATUS) to view line information for quotes.

You can also convert this quote to an order.

Navigation:

Click an quote link on the Quote Status page.

See Order Status - Order Details Page

Converting a Quote to an Order

Access the Quote Status - Quote Details Page(click an quote link on the Quote Status page).

Click the **Submit as Order** button on the Quote Details page to convert a quote to an order. You can add or remove products prior to conversion, but this causes the quote to lose its special pricing (if applied) and be repriced. Once you click the **Submit as Order** button, shipping and payment options are available on the checkout page and you can select shipping options, such as multiple shipments. You can also change the shipping destination, as well. Submitted quotes become Open orders.

Tracking Orders

Access the Order Status - Order Details Page(click an order link on the Order Status page).

For a particular order, access the Order Status - Order Details page from the Order Status page, then click the **Order Tracking** link that is a uniform resource locator (URL) to the third-party system. You can see the status of your packages. This link only appears when URL links for tracking are set up in advance.

Important! You can use the Order Status page to link to an order fulfillment system with the keys for that order. When you click the link, a fulfillment page appears that provides order status details. For example, a link to the PeopleSoft Order Management order status page provides real-time status from that particular fulfillment system.

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