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PeopleSoft CRM 9.2: PeopleSoft Portal Pack

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Documentation Accessibility

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Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

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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

•   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.

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)

- 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

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

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Chapter 1

Getting Started with PeopleSoft CRM Portal Pack

PeopleSoft CRM Portal Pack Overview

PeopleSoft CRM Portal Pack provides a collection of pagelets that can be individually selected to appear on a corporate intranet or extranet homepage. The individual pagelets provide information that is gathered from various PeopleSoft CRM applications.

PeopleSoft CRM Portal Pack Implementation

PeopleSoft CRM Portal Pack does not require table-loading implementation steps.

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 appears in the preface in the Application Fundamentals product documentation with information about where to find the most current version of each.

Chapter 2

Understanding PeopleSoft CRM Portal Pack

Understanding PeopleSoft CRM Portal Pack

PeopleSoft CRM Portal Pack is a collection of portal pagelets for corporate intranet or extranet homepages that provides access to key data and transactions within PeopleSoft CRM applications for use in the employee and customer portal registries. The portal pack supplements the PeopleSoft CRM applications that provide the underlying data.

When you install PeopleSoft CRM Portal Pack, your users can personalize their portal homepages by adding the pagelets that they need. Standard PeopleSoft system role-based security ensures that users can access only the pagelets that are appropriate to their roles. You click the **Content** link (located above the left navigation menu) to access a list of role-appropriate pagelets.

Users can configure their portal homepages with three narrow columns or one narrow and one wide column. Some pagelets have both a narrow and a wide version, each with its own object name. You click the **Layout** link (located above the left navigation menu) to modify pagelet layout. When this documentation provides two object names for a pagelet, the first one refers to the narrow version.

To use the pagelets in PeopleSoft CRM Portal Pack, you must first install the enabling CRM application. The CRM pagelets and the enabling application are listed in the PeopleSoft CRM Portal Pack Pagelets topic of this document.

You can also design your own pagelets when your installation includes PeopleSoft CRM Portal Pack.

See *PeopleTools: Portal Technology* product documentation.

Audience

The PeopleSoft CRM Portal Pack pagelets are targeted for specific functional roles, which generally fit into three audiences (which mirror the different portal registries):

- Employee

- Customer

Pagelet Security

You control pagelet security at the component level by associating it with a permission list, which is then associated with a role; each pagelet has its own component to enable more granular access. You can ascertain a pagelet's component name in PeopleSoft Application Designer by searching for definition references to the page's system (or object) name.

Pagelets are grouped into functional roles as an example of how to organize access. You need to create the proper permission lists and associate them with actual role definitions before your users can access

them, or use the permission list definitions that are provided in the delivered system data. The PeopleSoft system also delivers sample roles that you can use as an example of how to set up pagelet access.

Here is an example of some of the roles that include access to PeopleSoft CRM Portal Pack pagelets:

- Call center agent

- Customer

- Consumer

- Broker

- Field sales representative

- Help desk agent

- Guest

Related Links
"Understanding PeopleSoft CRM Security" (Application Fundamentals)

Pagelet Personalization

Some pagelets require that you first select default settings on a related customer selection page prior to using the pagelet. The system retrieves the transactional information that is associated with the selection to display in the pagelet.

To configure a pagelet, click the **Customize** button:

This example illustrates the tool bar with the Customize button.

If you don't specify values on a pagelet's customer selection page, the pagelet does not display any data. Pagelets that do not have configuration options do not display this button.

Each of the following pagelets provide information about a specific type of customer interaction, such as sales leads, support cases, and service orders. Collectively, these pagelets provide a 360-degree view of your organization's relationship with the customer. Many of these pagelets provide links that enable you to navigate to further details about the interactions; some enable you to add new interaction information:

- Agreements

- Installed Products

- RMA

- Recent Interactions

- Recent Leads

- Recent Support Cases

- Recent Service Orders

- Recent Opportunities

- Relationship Grid

Note: You must first select a customer or contact by using the Customer Selection page. After you identify the customer or contact, the other configurable pagelets display information that is related to that customer or contact.

Customer Selection

You use the Customize button to select the customer, consumer, or contact for the information that you want to view. When you click the Customize button, the system displays the Customer Selection page:

This example illustrates the fields and controls on the Customer Selection page.

Enter search criteria and click the Search button to select the customer, consumer, or contact for whom you want to view interaction information. After you select a customer, consumer, or contact and save your selection, information that is related to your selection appears on the configurable pagelets until you make another selection.

PeopleSoft CRM Portal Pack Pagelets

This topic lists the pagelets that make up PeopleSoft CRM Portal Pack and identifies:

- The audience for the pagelet: employees or customers.

  The audience also identifies the portal registry where the pagelet is registered.

- The role of the person who uses the pagelet.

  These are functional roles, not delivered PeopleTools roles.

- The pagelet's enabling application.

The enabling application provides the information that appears in the pagelet.

Pagelet Name	Audience	Functional Role	Enabling Application
Catalog Search

RX_PROD_SRCH_PGT | Customer | Customer, consumer, or broker | PeopleSoft Order Capture Self Service |
| My Reports

RC_CASE_SW_SS_RPT.GBL | Customer | Customer | Any PeopleSoft CRM application |
| Recent Cases

RC_SS_SW, RC_SS_SW_W | Customer | Customer, consumer, or broker | PeopleSoft Support Self Service |
| Recent Orders

RE_C_QUO_PGT | Customer | Customer, consumer, or broker | PeopleSoft Order Capture |
| Recent Quotes

RE_C_ORD_PGT | Customer | Customer, consumer, or broker | PeopleSoft Order Capture |
| Services

RBT_SERV_PGT | Customer | Customer, consumer, or broker | PeopleSoft Order Capture Self Service |
| Shopping Cart

RE_CART_PGT | Customer | Customer, consumer, or broker | PeopleSoft Order Capture |
| Site Selection

RX_LANG_SEL_PGLTL | Customer | Guest user | PeopleSoft Order Capture |
| Agreements

RI_PE_AGREEMENT_GBL | Employee | Customer service representative | PeopleSoft Support or PeopleSoft Integrated FieldService |
| Catalog Search

RX_PROD_SRCH_PGT | Employee | Employee | PeopleSoft Order Capture Self Service |
| CRM Chart 1, 2, and 3

(iScript) | Employee | Manager or employee | PeopleSoft Support, PeopleSoft Order Capture |

Pagelet Name	Audience	Functional Role	Enabling Application
CRM Worklist PE_WRKLST_PGT	Employee	Employee	Any PeopleSoft CRM application
Installed Products PE_PROD_PGT	Employee	Customer service representative	Any PeopleSoft CRM application
My Forecast REP_FCAST_PGT	Employee	Salesperson	PeopleSoft Sales
My Leads PRTL_LEADS_PGT	Employee	Salesperson	PeopleSoft Sales
My Monthly Calendar PRTL_CAL_MTH_PGT	Employee	Salesperson	PeopleSoft Sales
My Opportunities PRTL_OPP_PGT	Employee	Salesperson	PeopleSoft Sales
My Reports PT_PSRF_REPRT_PAGELET _GBL	Employee	Employee	Any PeopleSoft CRM application
My Tasks RSF_PRTL_ACTLIST_PGT	Employee	Salesperson	PeopleSoft Sales
My Call Reports RD_MY_CALLRPT	Employee	Salesperson, marketing representative, field service agent, customer service representative	Any PeopleSoft CRM application
Recent Interactions RI_PE_REC_INT_PGT	Employee	Customer service representative	Any PeopleSoft CRM application
Recent Service Orders RI_PE_SO_PGT	Employee	Customer service representative	PeopleSoft Integrated FieldService
Recent Support Cases PE_SUPPORT_PGT	Employee	Customer service representative	PeopleSoft Support

Pagelet Name	Audience	Functional Role	Enabling Application
Relationship Grid CR_RI_REL_GRID_PGT_GBL	Employee	Employee	Any PeopleSoft CRM application
RMA RI_PE_RMA_PGT	Employee	Customer service representative	PeopleSoft Support
Self Service Help Desk RC_SS_HD, RC_SS_HDW	Employee	Employee	PeopleSoft HelpDesk

PeopleSoft CRM Pagelet Wizard Pagelets

Pagelet Wizard provides a user-friendly, browser-based graphical user interface that guides you through a series of steps to create and publish a pagelet. The following pagelets that are available with the CRM Portal Pack were built using the Pagelet Wizard feature: EOPP_CREF_BY_DATE_ID, RC_CASES_AVG_AGE, RC_CASES_BY_PRIORITY, RC_CASES_BY_SOURCE, RC_CASES_CLOSED_FIRSTCONTACT, RC_CASES_CREATED_CLOSED, RO_PRT_MGR_ORD, RO_PRT_MGR_QUO, RO_PRT_REP_ORD, and RO_PRT_REP_QUO.

The primary users of these pagelets are call center agents and managers and sales representatives and managers.

Authorized users can easily modify and maintain these pagelets using the Pagelet Wizard.

See "Using Pagelet Wizard to Create and Manage Pagelets" in the *PeopleTools: Portal Technology* product documentation.

Web Libraries

These are the web libraries that are associated with CRM pagelet functionality. You must ensure that users have access to the proper web libraries for the pages they need to access.

See *PeopleTools: Portal Technology* product documentation.

Web Library Name	Owner	Description
WEBLIB_CAL_SYNC	RB	Starfish - Used for XML Link synchronization for the Calendar and Task items, between PeopleSoft and Starfish.

Web Library Name	Owner	Description
WEBLIB_CAMPAIGN	RA	Marketing - Campaign Viewer code
WEBLIB_IMAGEMAP	RGB	Demo - Image map processing demo - first one is server side, second one is client side.
WEBLIB_RB	RB	Web Library record for Integration and Technology
WEBLIB_RBF_MENU	RFB	Industry - Used in 8.1 for FSI application to transfer to a particular page upon log in. It has not been used from 8.4 onwards.
WEBLIB_RC	RC	Call Center - This derived record holds all the code for the Charts.
WEBLIB_RF	RF	FieldService - Business Interlink Defn
WEBLIB_RI	RI	Interaction Management - iScript Pagelet Search
WEBLIB_RS_SCHD	FRS	This code uses iScript and generates the HTML Table for the calendar page;
WEBLIB_SU	RB	JustTalk - WebLib for JustTalk Single User synchronization.

Chapter 3

Working with CRM Employee-Facing Pagelets

Understanding Employee-Facing Pagelets

Employee-facing pagelets enable employees to view and update their own information and view customer information. Pagelets that display customer or contact information can be configured by using the **Customize** button.

Using Employee-Facing Pagelets Common to CRM Applications

This topic discusses how to use the CRM employee pagelets that are common to the PeopleSoft CRM applications.

Pagelets Used to View Customer Information

This table describes the pagelets used to view information about a customer:

Pagelet	Usage	For More Information
Installed Products	Displays the product ID and quantity of each product installed at a customer's site and provides a link to the product ID details.	See "Understanding Installed Products" (PeopleSoft Product and Item Management).
Recent Interactions	Lists the most recent interactions that a customer has had with your organization and provides a link to the details.	See "Understanding Interactions" (Application Fundamentals).
Self Service Help Desk	Enables users to review their own cases.	See "Understanding Customer Self-Service" (Application Fundamentals).
CRM Worklist	Enables users to see a summary of their worklist items and supports navigation to individual worklist items.	See "Understanding PeopleSoft CRM Workflow" (Automation and Configuration Tools).
Relationship Grid	Provides a view of the relationships that a customer has with other customers or contacts in the database.	See "Understanding the 360-Degree View" (Application Fundamentals).

Using PeopleSoft Sales Pagelets

PeopleSoft Sales offers several pagelets to help sales representatives manage their sales activities. The system includes pagelets for each of the major sales objects—leads, opportunities, and forecasts—plus pagelets for managing sales tasks. This topic discusses how sales representatives manage their sales activities by using the pagelets.

Pagelets Used to View Sales Activities

This table describes the pagelets used to view sales activities:

Pagelet	Usage	For More Information
My Forecast	Displays at-a-glance estimates of future sales revenues for sales opportunities.	See "Leads and Opportunities" (PeopleSoft Sales). See "Understanding Forecast Functionality in PeopleSoft Sales" (PeopleSoft Sales).
My Leads	Displays the three most recent leads based on the date and time that the lead was added.	See "Leads and Opportunities" (PeopleSoft Sales).
My Calendar	Displays your calendar for the current month. You can enter new task information or update existing tasks on your calendar.	See "Understanding Sales Tasks" (PeopleSoft Sales). See "Understanding Calendars" (Application Fundamentals).
My Opportunities	Displays the opportunity name, customer, telephone number, and status of your three most recently added sales opportunities and provides a link to the details page, where you can edit the opportunity information.	See "Leads and Opportunities" (PeopleSoft Sales).
My Tasks	Displays a list of upcoming tasks from your calendar.	See "Understanding Sales Tasks" (PeopleSoft Sales).

Using PeopleSoft Support Pagelets

This topic discusses how to use the pagelets that PeopleSoft Support enables.

Pagelets Used to View Support Cases

This table describes the pagelets used to view support cases:

Pagelet	Usage	For More Information
Agreements	Displays a summary list of a customer's existing service or support contract agreements and the status of each, and provides a link to the details of the agreement definition.	See "Understanding Agreements and Warranties" (Application Fundamentals).
RMA	Displays a list of a customer's return material authorizations (RMAs), provides a link to the RMA details, and provides an **Add** link to create a new RMA.	See "Understanding Installed Products" (PeopleSoft Product and Item Management).
Recent Support Cases	Displays a list of a customer's recent support cases, provides a link to the case details, and provides an **Add** link to create a new support case. **Note:** When you add a case from the Recent Support Cases pagelet, the case uses the default display template based on the user preferences.	See "Understanding the Configurable Case" (PeopleSoft Call Center Applications).

Using PeopleSoft Integrated FieldService Pagelets

This topic discusses the pagelets that PeopleSoft Integrated FieldService activities enable.

Pagelets Used to View Agreements and Service Orders

This table describes the pagelets used to view agreements and service orders:

Pagelet	Usage	For More Information
Agreements	Displays a summary list of a customer's existing service or support contract agreements and the status of each, and provides a link to the details of the agreement definition.	See "Understanding Agreements and Warranties" (Application Fundamentals).
Recent Service Orders	Displays a list of a customer's recent service orders, provides a link to the service order details, and provides an **Add** link to create a new service order.	See "Understanding Service Orders" (PeopleSoft Integrated FieldService).

Chapter 4

Working with PeopleSoft CRM Charts

Understanding CRM Charts

This topic discusses:

- CRM chart pagelets.

- Delivered charts.

CRM Chart Pagelets

Three identical pagelets, CRM Charts 1 through 3, provide charts that give users valuable snapshots of their operations. Each chart pagelet can be configured to show summary information, details, or both:

- Summary charts show the total number of cases that meet a chart's selection criteria during a specified time period.

- Detail charts divide the time period into smaller units and provide subtotals for each period.

- Combined charts show a summary chart followed by a detail chart.

Position the mouse over a chart (over the bar representing the charted data) to display pop-up text with information about the underlying data.

Delivered Charts

The PeopleSoft system delivers charts that display call center and order capture data. When you set up charts, you can change the chart names and the labels that are used for the x- and y-axes on the chart.

PeopleSoft Support Charts

This table describes charts used for Call Center data:

Chart Name	*Description*
Case Backlog	The number of new cases created during the specified time period minus the number of cases closed during the specified time period. This number is determined based on the **Date Created** and**Date Closed** fields in the case.
	Note that this number may be negative if more cases are closed than created.

Chart Name	Description
Cases Resolved by the First Call	The number of cases closed on the first call during a specified time period. This number is determined based on the **Resolved by First Contact** field in the case.
Cases with Links to Resolutions	The number of new cases that are resolved. Cases are considered resolved if they are associated with a solution and the solution status is *Resolution Successful.* This chart differs from the Problem Reports Closed chart because resolving a case does not necessarily close the case.
High Priority Cases	The number of high-priority cases created during the specified time period. This number is determined based on the **Priority** field in the case. (All priorities are associated with one of three priority types: *high, medium,* or *low.*) Cases are counted regardless of the current status, so this chart might include high-priority cases that are closed. The system evaluates the priority at the time that the chart fetches the data; cases for which the priority has changed from *high* to another value are not included in the count.
New Problem Reports	The number of cases created during the specified time period. This number is determined based on the **Date Created** field in the case.
Problem Reports Closed	The number of cases closed during the specified time period. This number is determined based on the **Date Closed** field. (All statuses are associated with one of three status categories: *open, closed,* or *cancelled.*)

PeopleSoft Order Capture Charts

This table describes charts used for Order Capture data:

Chart Name	Description
Captures on Hold	The number of captures created during the specific time period whose current status is *Hold.*
New Orders	The number of sales orders created during the specific time period.

Chart Name	Description
New Quotes	The number of quotes created during the specific time period.

Related Links

"Understanding the Configurable Case" (PeopleSoft Call Center Applications)

"Understanding Order Capture" (PeopleSoft Order Capture Applications)

Defining Chart Names and Labels

This topic discusses how to define chart names and labels.

Page Used to Define Chart Names and Labels

Page Name	Definition Name	Usage
Defining Chart Names and Labels	RB_CHART_SETUP	Configure labels for the charts that the PeopleSoft system delivers. You access these charts through the CRM Charts pagelets.

Defining Chart Names and Labels

Use the Chart Setup page (RB_CHART_SETUP) to configure labels for the charts that the PeopleSoft system delivers.

You access these charts through the CRM Charts pagelets.

Navigation:

Set Up CRM > **Common Definitions** > **Call Center Chart Setup**

This example illustrates the fields and controls on the Chart Setup page.

This page lists the charts that the PeopleSoft system delivers.

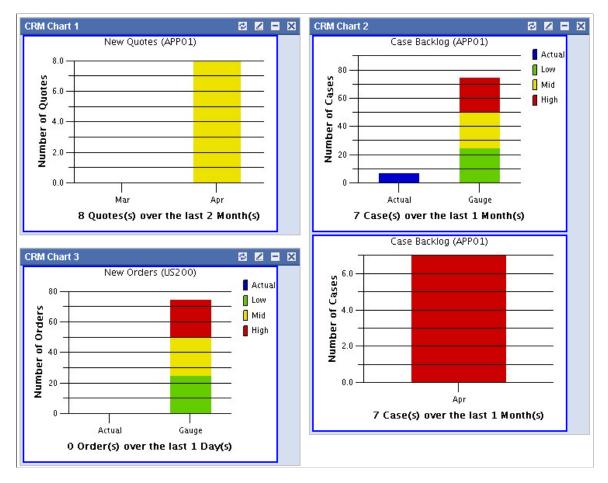| Field or Control	Description
Chart Name	Enter the name to be used as the label in the chart pagelet. When users select which chart to display, they see the name entered here.
Message Set Number, X-Axis Number, and **Y-Axis Number**	Labels for the x- and y-axes in the chart come from the message catalog. Enter the message set number where the labels are stored, and enter separate message numbers for the x-axis label and the y-axis label.
SQL Name	Enter the name of the PeopleTools SQL object that populates the chart.
Chart ID	Enter the chart ID used to set parameters for the selected SQL program. The charts that the PeopleSoft system delivers use chart ID *1,* which is appropriate for charts that display numbers of objects (for example, the number of cases or orders) over time.

Viewing CRM Charts

This topic discusses how to view the CRM chart pagelets.

Viewing the CRM Chart Pagelets

Use these pagelets to review metrics related to your call center and order capture operations:

This example illustrates the fields and controls on the Examples of CRM charts 1 through 3CRM Charts 1-3 .

All of the pagelets present data in bar charts:

- A detail bar chart displays a bar for each included time period.

- A summary bar chart displays one bar for the actual data and another bar for a gauge.

  The gauge is divided into low (green), middle (yellow), and high (red) zones for easy evaluation of the chart data. Users set low, middle, and high ranges when they personalize the page.

The pagelets also display the following text information:

- The chart name (for example, Case Backlog) appears at the top of the pagelet.

- The business unit appears in parentheses after the chart name.

- A text summary of the number of cases and the included time period appears under the bar graph.

Personalizing Charts

This topic discusses how to personalize CRM chart pagelets.

Page Used to Personalize Charts

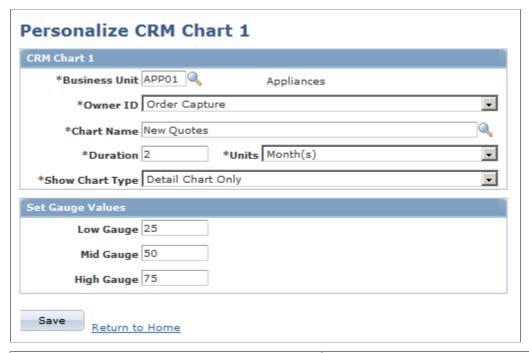| Page Name	Definition Name	Usage
Personalizing CRM Chart Pagelets	RB_CHART_1, RB_CHART_2, RB_CHART_3	Select a chart and its display options.

Personalizing CRM Chart Pagelets

Use the Personalize Summary Chart page (RB_CHART_1, RB_CHART_2, RB_CHART_3) to select a chart and its display options.

Navigation:

Click the **Customize** button for the pagelet to be personalized (CRM charts 1 through 3).

This example illustrates the fields and controls on the Personalize CRM Chart page.

Field or Control	Description
Business Unit	Enter the business unit to be charted.
Owner ID	Select the owner of the chart. Values are: *Call Center* and *Order Capture.*
Chart Name	Select a chart associated with the selected owner ID.

Field or Control	Description
Duration and Units	Select the number of days, hours, months, or weeks to be included in the chart data. You can show up to 24 hours, 7 days, 16 weeks, or 12 months of data.
Show Chart Type	Select a chart type. Values are: *Detail Chart Only, Summary Chart Only,* and *Summary and Detail Chart.*
Low Gauge Value, Mid Gauge Value, and**High Gauge Value**	Enter the top number for the low, middle, and high ranges in the gauge that appears in a summary chart. The gauge appears alongside the actual data. The gauge is strictly informational; it does not affect underlying data. Gauges appear only in summary charts; ignore these fields if the chart type is *Detail Chart Only.*

Chapter 5

Working with PeopleSoft CRM Self-Service Pagelets

Understanding Self-Service Pagelets

Customer-facing pagelets enable customers, consumers, and brokers who are registered users of the system to view and update their own information. Unregistered users can see some pagelets, such as Catalog Search, Shopping Cart, and Site Selection. The Site Selection pagelet is available to unregistered or guest users for the purposes of navigating multiple sites.

Related Links

"Understanding Customer Self-Service" (Application Fundamentals)

Using PeopleSoft Order Capture Self-Service Pagelets

This topic discusses how customers manage their personal information and shopping orders, select websites, and search catalogs by using the following pagelets.

Pagelets Used to View Customer Information

This table describes the pagelets used to view customer information:

Pagelet Name	Usage	For More Information
Catalog Search	Customers can search a specified catalog or all catalogs based on keywords.	See "Defining Order Capture Self-Service Business Units" (PeopleSoft Order Capture Applications) See "Understanding Catalogs" (PeopleSoft Product and Item Management).
My Information	Customers can view the name, address, phone number, and email address that are associated with a user who is signed in to the system.	See "Understanding Customer Self-Service" (Application Fundamentals)
Shopping Cart	Displays the number of products along with the order subtotal of a customer's shopping cart. Provides the customer with a direct link to checkout.	See "Defining Order Capture Self-Service Business Units" (PeopleSoft Order Capture Applications)

Pagelet Name	Usage	For More Information
Site Selection	Guest users can select a website if multiple sites are implemented. Switches a user to the selected site.	See "Understanding Customer Self-Service" (Application Fundamentals)
Recent Orders	Customers can view recent orders by order number, order date, and status, and they can link directly to order details.	See "Understanding Service Orders" (PeopleSoft Integrated FieldService).
Recent Quotes	Customers can view recent quotes by quote number, quote date, and status, and they can link to quote details.	See "Understanding Service Orders" (PeopleSoft Integrated FieldService).

Using PeopleSoft Support Pagelets

This topic discusses how customers can review their support cases and search for solutions by using the Recent Cases pagelet.

Pagelet Used to View Recent Cases

This table describes the pagelets used to view recent cases:

Pagelet Name	Usage	For More Information
Recent Cases	Customers can view the five most recent open cases and access pages for reviewing existing cases, creating new cases, and searching for case solutions. **Note:** The pagelet has a slightly different appearance, depending on whether it is placed in a narrow or a wide column on the portal homepage.	See "Understanding the Configurable Case" (PeopleSoft Call Center Applications). See "Understanding Self-Service Transactions" (PeopleSoft Call Center Applications).