Oracle® Marketing

Concepts and Procedures

Release 11*i*

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Oracle Marketing Concepts and Procedures, Release 11*i*

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Contents

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Preface

Welcome to the Oracle Customer Relationship Management, Release 11i, suite of applications.

This Concepts and Procedures provides information and instructions to help you work effectively with Oracle Marketing.

This preface explains how Concepts and Procedures is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- Marketers wanting to manage the complete life cycle of marketing campaigns to sell products and services
- Marketing system administrators

This guide assumes you have the following prerequisites:

- Understanding of the company business processes
- Knowledge of products and services as defined by your marketing policies

Structure

This manual contains the following chapters:

"Understanding Oracle Marketing" provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the relationship of the application to other Oracle or third-party applications.

"Using Oracle Marketing" provides process-oriented, task-based procedures for using the application to perform essential business tasks.

"Implementing Oracle Marketing" provides general descriptions of the setup and configuration tasks required to implement the application successfully.

Conventions

The following conventions are also used in this manual:

Convention	Meaning
. . .	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
. . .	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted.
boldface text	Boldface type in text indicates a term defined in the text, the glossary, or in both locations.
< >	Angle brackets enclose user-supplied names.
[ ]	Brackets enclose optional clauses from which you can choose one or none.

Understanding Oracle Marketing

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the relationship of the application to other Oracle or third-party applications.

Overview of Oracle Marketing

Oracle Marketing leverages leading-edge technologies to help global companies win and retain profitable customers. It is a comprehensive marketing tool that plans, executes and analyzes results of customer-focused marketing campaigns. Oracle Marketing includes the following functionality:

Tools

Customer Profiling

Automated Execution

Connecting to the Marketplace

Campaign Measurement and Analysis

Closed Loop Marketing

Tools

Oracle Marketing provides tools to allow decisions to be based on current information as well as historical data. This gives marketers the ability to answer performance questions like:

- Is the campaign that was launched last week meeting expectations? Marketers can perform real time analysis of campaign results and performance to plan their next actions. Thus, the marketer can manipulate the campaign in real time to improve performance and to meet business objectives.

- Which customer segments are responsive to my campaigns?
- What is the most effective means to reach these customer segments?

Customer Profiling

The focus has shifted from mass marketing to customer relationship marketing (or one-to-one marketing). This new level of customer intimacy is made possible by cheaper and faster data management, interactive media and the ability to customize marketing campaigns to the individual. The result is that the marketer knows the customer better.

Knowing the customer better allows campaigns to be customized to the individual. This is done by collecting and analyzing all company interaction with the customer in the areas of events, sales, marketing, service, and support.

By integrating, sorting, and analyzing data from all customer contact points across the enterprise (telemarketing, marketing, service and support, sales, billing), Oracle Marketing enables marketers to refine the targeting and segmenting of campaigns.

Campaigns are refined by targeting a population deemed to be most likely to buy into a particular message or product. Within that target population, the campaign can be further tailored to include personalized offers specific to the sub-population.

Automated Execution

Marketing professionals are spending up to 80 percent of their time executing marketing campaigns and programs and only 20 percent on strategy, planning, and analysis. With the emergence of new marketing channels such as the internet used simultaneously with telemarketing and traditional direct mail, the execution and tracking of marketing campaign results have become more complex and time consuming.

Connecting to the Marketplace

Post-campaign analysis, the traditional means of tracking campaigns, is no longer sufficient. Often, campaign results are not fully analyzed until months after the campaign ends.

Executives seek automated ways to execute campaigns and to analyze response in real time, and from all channels as it arrives. With analysis in hand, marketers adjust the campaign on the fly to boost chances of the campaign meeting expectations in terms of return on investment, number of leads, or other performance factors.

Real time campaign analysis allows marketers to allocate additional resources to successful campaigns, or to redefine the marketing tactics of poorly performing campaigns before completion.

Campaign Measurement and Analysis

To facilitate campaign effectiveness measurement, a closed loop marketing process must be in place that originates with demand creation and ends with revenue recognition.

Closed Loop Marketing

Corporations must be able to track campaign results and to calculate Return on Investment once campaigns are completed.

By virtue of its tight integration with Oracle Customer Relationship Management suite of applications, Oracle Marketing is the first marketing automation solution to actually close the loop. Oracle Marketing integrates with Oracle Sales and Oracle Order Capture, thereby allowing the marketing team to follow leads as they are generated. Such leads can become opportunities, and eventually produce profitable customers. Only through Oracle CRM can actual sales be traced to the first detection of customer interest in the company, whether at a trade show, through the internet, or in response to an ad.

Oracle Marketing captures campaign responses and tracks the status of leads and opportunities when passed on to Oracle Sales applications.

What are the Components of Oracle Marketing

Oracle Marketing is comprised of several objects. These are:

- Campaigns — organized, structured, and orchestrated grouping of tasks, assignments, activities, creative material, and other components designed to promote or sell concepts, products, or services to prospective audiences
- Events — trade shows, product launches, seminars, and other such activities that are created and executed in support of a campaign
- Audience — lists, segments, or queues of prospects and/or customers toward which marketing activities is directed

- Collateral — creative or advertising material that carries or presents the message of the campaign to the prospective customer
- Budget — amount of money allocated to finance the campaign
- Message — selected messages to be attached to campaigns

Campaign Hierarchy

The hierarchical structure of a campaign is as follows:

- **Rollup Campaign** The highest level of campaign management and resides at the top of the hierarchy.

  All budget and metric data roll up to the rollup campaign. The rollup campaign is not executed. It houses the general and higher level information about the campaign.

- **Execution Campaign** These exist under a rollup campaign.

  There is no limit to the number of execution campaigns that can exist. A different execution campaign exists for each channel used. Under a rollup campaign, an execution campaign is created for an email campaign, and another for a television ad. This separation allows analysis to be performed on each channel.
  If desired, the user can create execution campaigns that are subordinate to other, higher level execution campaign. This affords considerable flexibility for the user.

Budget

The budget is the source from which the campaign is to be funded, and the amount. Budget allows the manager to:

- Create marketing forecasts and enforce budgeting from the top down
- Forecast committed and actual costs by cost type and other details
- Plan for fixed and variable costs
- Obtain reporting as the marketing activity is in progress

Detailed Budget Planning

Execution budgets and the rollup budget work together. The sum of all execution campaign budgets cannot exceed the budget of the rollup campaign.

Budget Dates

These are the budget effectivity dates. Beyond these dates, marketing activities are not funded. Budget dates include definitions for

- when a campaign is forecasted to begin and end
- when a campaign actually begins and ends

Forecasted dates are ignored if actual dates are specified. If actual dates are not specified, then date validation is made against forecasted dates. Valid dates for the rollup (parent) campaign (forecasted or actual) should be entered before dates are specified for execution campaigns (children).

Understanding Approvals (Oracle Workflow)

Approval is the formalized process of approving budgets, campaigns and events.

Campaign approval is accomplished using the Oracle Workflow application. Oracle Workflow is invoked at points of decision from the Oracle Marketing application and processes the flow of approval in according to the business implementation.

When a campaign is sent for approval, Oracle Workflow drives the approval process. Oracle Workflow routes information of any type to people both inside and outside your enterprise, according to predefined business rules. Oracle Marketing provides predefined workflow processes embedded in the application.

These workflows consist of processes that can be viewed and assessed in Oracle Workflow. Each process is comprised of activities that represent the flow of information involved in approval. You can create additional activities to enhance and customize your workflow processes.

You can also use Oracle Workflow to create custom workflow processes for each approval.

In Workflow Monitor, you can view the status of a workflow process, as well as perform various administrative operations.

Understanding Tasks

A task is a job that is planned, created and then accomplished by the assigned individual or group to contribute toward a total campaign or event effort.

Examples of task types that can be implemented in Oracle Marketing include

- Lunch

- Presentation
- Execution
- Milestone
- etc.

Task status is monitored through alerts and notifications that are managed by Approvals. keep approvers and others current on campaign progress.

Understanding Audience

What does *Tracking* and *Response* Mean?

In the case of an execution campaign, a list is generated and forwarded to a channel. Customers reply to that Channel or to another media specified in collateral they receive. When customers respond, Oracle Marketing tracks the campaign the customer replied to.

How is Customer Response Information Used?

Oracle Marketing tracks Customer Response. It maintains records of how Customers responded to a given Campaign. It also allows you to determine how successful are particular campaign attributes are for a given group of people. With this information, you are able to

- more efficiently develop list building criteria for future campaigns
- learn what type of customers respond best to particular channels, offers, etc.

What is Auto-Generation?

Consider this scenario.

You must generate 1,000 responses by a certain target date. You create a list of 15,000 names. By your target date, you have received only 750 responses. You can prevent missing your target if you set up auto-generation to work for you. If you can create a new list of from those non-responders automatically. Auto-generation will notify you when it is ready to be executed.

In summary, Auto-Generation is the capability to establish criteria by which you are Notified, and the subject of the notification in response to campaign performance. When you receive Notification you can elect to generate a new List containing Customers that meet the criteria you established.

Another way to use Auto-Generation is to specify criteria you want to build a list with.

Example Men in San Francisco between the ages of 25-34 with an income greater than $100,000.

You can use your entire database as the source of this list, and set the list to Auto-Generate each month.

The list will keep current, and will track those that are new additions to, or have fallen off of the list.

Templates

A selected template is assigned to the List to govern how customers and customer information will be displayed in the generated List.
The template is a Workbook created in Discoverer by your Discoverer Administrator. Select the template that provides the information you want to see and to later export to a file.

> **Note:** A Workbook is a term used in Oracle Discoverer. It is a Select-statement stored in the database that is used in Oracle Marketing. An existing List is one that was generated previously.

Currently, templates exist for Address details and Phone details.

> **Note:** If you have not already created Queries/Workbooks in Oracle Discoverer, then launch Discoverer using the **Create Queries** button. For more information on tasks must be performed in Discoverer.

- A Seed List is a List of Pre-defined persons included as *default* customers in a List. These Customers are usually people working internally in your company.

  Seed lists are used as a means to ensure that the campaign was executed an planned. For example, the seed list may be used to determine if

  the mail house actually sent the mail on schedule the quality of service provided prospect customers is adequate when they are contacted during a telemarketing campaign

Deduplication removes duplicate entries in a list according to rules specified for the list. To deduplicate a list, at least one rule must be defined and associated with the list. Two or more rules can be associated with a list. When this occurs,

- each rule is assigned a priority
- list deduplication proceeds starting with the highest priority rule, then making subsequent passes using rules of descending priority

Note: After each pass, rows that have been processed are excluded. Thus, each rule operates on a diminishing set of entries.

Rows having duplicates in them are flagged as **duplicated**.

Imported List

The List Workbench screen allows the user to view

- multiple Source- or Prospect Lists
- Discoverer workbooks stored in the database

Note: Lists can be imported from third parties if desired.

The screen is query-only. Users can change the list status, but cannot change other list details.

Importing Lists functionality fulfills the following business needs:

- Users can generate a target list based on prospects purchased from third party vendors.
- Users can track the progress of a campaign by analyzing the responses generated from a certain targeted list of prospects. The responses can come from an external application.
- Users can track the success of a campaign by analyzing the leads which can be loaded from data tracked by an external application.

Understanding Events

Events can be activities that are created and executed as a part of a campaign, or as an independent activity. Events allows the marketer to:

- Create and manage events
- Set up event prices and payment methods
- Manage open and restricted registration as controlled by rules and lists
- Integrate with call centers to distribute information and to facilitate registration

You can use Events to enroll attendees in event offerings. Event types include seminars, product demonstrations, classes, etc.

Where applicable, event payment can be processed via credit card or purchase order. You can send enrollees event collateral including descriptions, directions, maps, and cover letters.

Events will track the number of available spaces for the event. If no space is available, the contact can be placed on a waiting list. The application may (depending on your implementation), automatically enroll a contact on a waiting list if space becomes available, or it may notify agents via work queues to contact prospective enrollees for confirmation.

Understanding Collateral

A collateral is any type of collateral or promotional material that is used to support the campaign. Collateral can be

- physical item, like data sheets or logo-bearing pens
- electronic, like banner ads or video clips

Collateral Types and Sub-Types

Collateral types include

- Catalog
- Fact sheet
- Brochure
- Flyer

Using Oracle Marketing

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

This chapter covers overall Navigator and screen functionality, and explains how to use the fields and other elements within screens.

Managing Campaigns

Viewing or Editing a Campaign

Creating a Campaign

Copying a Campaign

Associating Events to a Campaign

Managing Event Offering Registration

Viewing or Editing a Campaign

Prerequisites

To view: User must have user permissions.

To Edit: The user must own the campaign or have the required access privileges.

Steps

1. From the Campaign window, select the **Campaign** tab.
2. Select the hyperlink for the campaign of interest. The campaign details screen appears.
3. View the campaign details. Detail categories include:
   - General (the initial screen)
   - Products
   - Collateral
   - Costs

- Metrics
- Notes
- Tasks
- Attachments
- Team

Note: Each campaign will use subsets of items in this list, depending on setup type.

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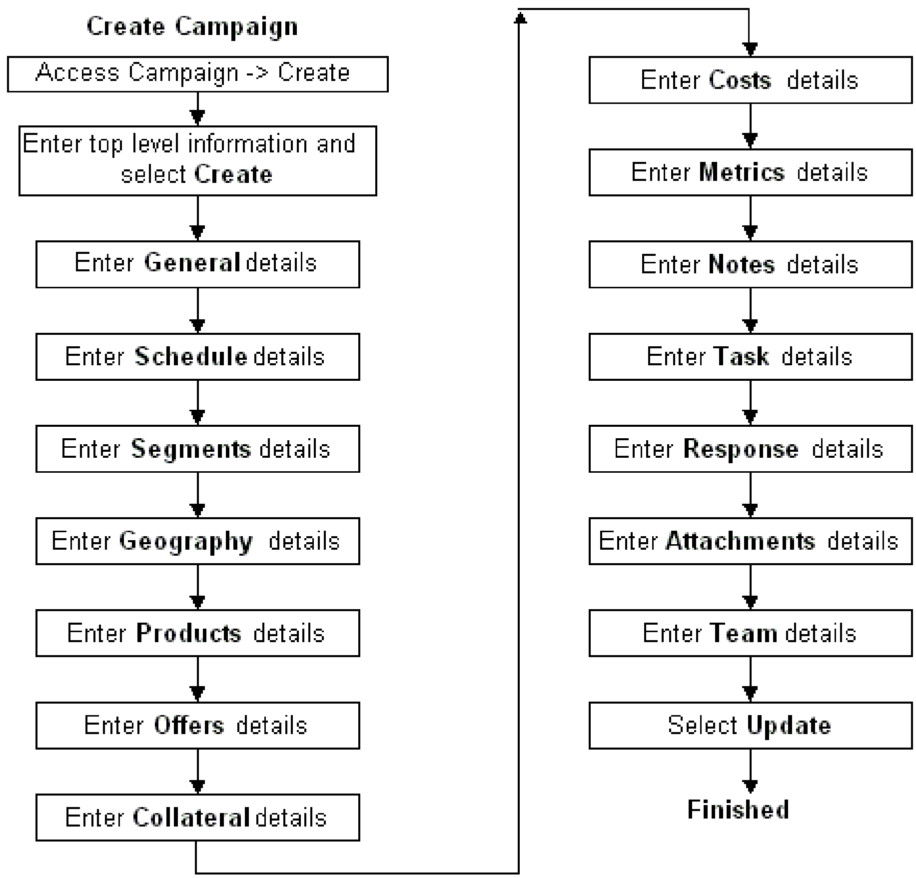
4. Edit the campaign as appropriate. Change values in the details fields listed above.

Creating a Campaign

The tasks involved in creating a campaign are shown in the figure below.

Creating a Campaign



Prerequisites

The user must have user permissions.

Steps

1. From the Campaign window, select **Create**.

   The Create Campaign screen appears.

Entering the General Details

Provide basic information needed to create a campaign.

1. Choose **Execution** or **Rollup** to designate the campaign type.
2. Select the **Campaign Type**.
3. If you do not want it published, check the **Confidential** check box.

> **Note:** With **Confidential** checked, only team members can view the campaign.

4. Enter a **Name** for the campaign and identify the **Parent** campaign if this is an Execution type.
5. Choose the **Purpose** of the campaign and enter the **Source Code**. If you do not enter one, the system will create one.
6. Choose the **Activity Type.**
7. Choose the **Activity** from among choices.
8. Designate the specific **Channel** on which the Activity will be conducted.
9. Choose the **Priority** that best applies to the campaign.
10. Enter **Start** and **End** dates in the format MO/DD/YY.
11. Choose the **Budget Amount** currency and enter a value for the budget.
12. Enter the campaign **Owner** and a **Description** for the campaign (optional).
13. Select **Create** to save information for the new campaign.

Entering Campaign Schedule

Define the schedule for the campaign.

Prerequisites

The user must have user permissions.

Steps

1. From the **Campaign Setup** screen, select **Campaign Schedule.** The Campaign Schedule screen appears.
2. Enter details for this campaign including **Status** and **Date**.
3. Choose **Update** to move the schedule detail updates to the main window.

Entering Campaign Segments

Specify geographic areas that the campaign is to be conducted in.

Prerequisites

The user must have user permissions.

Steps

1. From the **Campaign Setup** screen, select **Campaign Segments —** the Campaign Segments screen appears.
2. Select the segment **Type.**
3. Enter or search for the **Segment Name**.
4. Enter size information.
5. Choose **Update** to move the detail updates to the main window.

Entering Campaign Geographies

Specify geographic areas that the campaign is to be conducted in.

Prerequisites

The user must have user permissions.

Steps

1. From the **Campaign Setup** screen, select **Campaign Geographies** — the Campaign Geographies screen appears.
2. Select the **Level**.
3. Enter or search for the **Name**.
4. Choose **Update** to move the detail updates to the main window.

Entering Campaign Offers

Specify offers to include in this campaign.

Prerequisites

The user must have user permissions.

Steps

1. From the **Campaign Setup** screen, select **Campaign Offers** — the Campaign Offers screen appears.
2. Select the offer **Type**.
3. Enter the offer **Name**.
4. Enter the offer **Code**.
5. If this is the primary offer, check the **Primary** checkbox.
6. Select the applicable **Date From** and **Date To** dates.
7. Choose **Update** to move the detail updates to the main window.

Entering Campaign Products

Specify products to include in this campaign.

Prerequisites

The user must have user permissions.

Steps

1. From the **Campaign Setup** screen, select **Campaign Products** — the Campaign Products screen appears.
2. Enter product information, including **Level**, **Category**, **Product**, and **Description** (optional).
3. Choose **Update** to move the detail updates to the main window.

Entering Campaign Collateral

Specify the collateral to use for this campaign.

Prerequisites

The user must have user permissions.

Steps

1. From the **Campaign Setup** screen, select **Campaign Collateral** — the Campaign Collateral screen appears.
2. Select the collateral **Type**.

3. Enter or search for the collateral **Name**.
4. Select the collateral **Usage**.
5. Enter the collateral **Quantity**.
6. Select the applicable **Date From** and **Date To** dates.
7. Choose **Update** to move the detail updates to the main window.

Entering Campaign Costs
Provide information on costs for this campaign.

Prerequisites
The user must have user permissions.

Steps
1. From the **Campaign Setup** screen, select **Campaign Costs —** the Campaign Costs screen appears.
2. Enter cost information, including **Cost Type**, **Variable**, and **Costs**.
3. Choose **Update** to move the detail updates to the main window.

Entering Campaign Metrics
Designate factors by which campaign success will be measured.

Prerequisites
The user must have user permissions.

Steps
1. From the **Campaign Details** screen, select **Metrics —** the Campaign Metrics screen appears.
2. Enter metric information, including **Name, Unit Value**, and **Forecast** and **Actual** values in the appropriate values of UOM.
3. Choose **Update** to move the detail updates to the main window.

Entering Campaign Notes
Enter notes to clarify various aspects of the campaign.

Prerequisites

The user must have user permissions.

Steps

1. From the **Campaign Details** screen, select **Notes —** the Campaign Notes screen appears.
2. Specify the **Note Type** and enter the textual note.
3. Choose **Update** to move the detail updates to the main window.

Entering Campaign Tasks

Some tasks may be dependent upon other tasks.

Example: Booking a media or channel can be done only *after* the budget is approved. Consequently, the booking task is dependent upon the budget approval task.

Identify tasks to be done to support the campaign.

Prerequisites

The user must have user permissions.

Steps

1. From the **Campaign Details** screen, select **Tasks —** the Campaign Tasks screen appears.
2. Enter task information, including the **Task**, **Type**, **Priority**, **Status**, **Start**, and **End** dates, the person to whom the task is assigned (**Assignee**). Add **Notes** to clarify the tasks.
3. Choose **Update** to move the detail updates to the main window.

Entering Campaign Attachments

Associate attachments with the campaign.

Prerequisites

The user must have user permissions.

Steps

1. From the **Campaign Details** screen, select **Attachments —** the Campaign Attachments screen appears.
2. Specify the attachments to associate with this campaign. Required information includes **Name, Type, Format**, **Date Attachment** and **Owner**.
3. Choose **Update** to move the detail updates to the main window.

Entering the Campaign Team

Specify people to include in the campaign team.

Prerequisites

The user must have user permissions.

Steps

1. From the **Campaign Details** screen, select **Team —** the Campaign Team screen appears.
2. information about team members. Select the **User**/**Role**. Enter **Name, Edit Metrics, Date Added** and contact information.
3. Choose **Update** to move the detail updates to the main window.

Entering Campaign Response

Enter response information for the campaign.

Prerequisites

The user must have user permissions.

Steps

1. From the **Campaign Details** screen, select **Response —** the Campaign Response screen appears.S
2. Identify the **Script** to use. Specify the means by which prospective customers should respond to the campaign; **Phone**, **Email**, **URL**.
3. Choose **Update** to move the detail updates to the main window.

Entering Campaign Message

Specify the message to associate with the campaign.

Prerequisites

The user must have user permissions.

Steps

1. From the **Campaign Details** screen, select **Message** — the Campaign Message screen appears.
2. Identify the **Message Type**. Select the **Message** from among those available.
3. Choose **Update** to move the detail updates to the main window.

Copying a Campaign

Copy an existing campaign, then modify the copy to create a new one.

Prerequisites

The user must have user permissions.

Steps

1. From the Campaign window, select the **Campaign** tab.
2. Select the hyperlink for the campaign to be copied. The campaign details screen appears.
3. Select **Copy**. The copy campaign screen appears.
4. Ensure that the name of the **Source Campaign** is correct, or select a new one.
5. Designate the name for the **New Campaign**. Select the **Source Code** (if appropriate) and the **Start Date**.
6. Check the check boxes of **Select Attributes for Copying** fields to designate the attributes to copy to the new campaign.
7. Select **Copy Now**. The new campaign is created.
8. Edit the details for the new campaign, and provide input for attributes that were not copied from the source campaign.

Managing Collateral

Viewing Existing Collateral

Creating Collateral

Associating Collateral With a Campaign

Viewing Existing Collateral

Prerequisites

The collateral must have been created and must be available for use.

Steps

1. From the Collateral window, choose **Collateral**.
2. Choose the collateral item of interest. The collateral details screen appears.
3. To view the selected collateral, click the link in the **Attachments** section. The collateral is displayed.
4. To remove a collateral, check the **Remove** check box and select **Update**.

Creating Collateral

Create collateral to associate with a campaign.

Prerequisites

The user must have user permissions.

Steps

1. From the Campaign window, choose **Collateral**.
2. Choose **Create**. The Create window opens.
3. Assign a collateral **Name**.
4. Enter the collateral **Version** to facilitate tracking.
5. Choose the **Language**.
6. Choose the **Status**.
7. Choose the **Type** and **Subtype**.
8. Enter the dates that the collateral is **Available From** and **Available Until**.
9. Enter the collateral **Owner.**
10. Choose the **Budget Amount** currency and enter a value for the budget.

11. Choose the **Budget Amount** and **Budget Source** it is funded by.
12. Designate this campaign as **Private** if you do not want it published, and (optionally) enter a **Description**.
13. Provide a **Description** if desired**.**
14. Select **Create** to create the collateral.

Associating Collateral With a Campaign

Prerequisites

The user must have user permissions.

Steps

1. Select the Campaign window.
2. Select the hyperlink for the campaign you want to associate the collateral to. The campaign details screen appears.
3. Select the **Collateral** detail item.
4. Select the collateral **Type**.
5. Choose **Go to Existing Collateral**. The available collateral is listed in the screen.
6. Select the collateral piece to associate with the campaign.
7. Select **Update**.

Managing Events

Creating an Event

Editing or Viewing an Event

Creating a One-Off Event

Associating an Event With a Campaign

Creating an Event

You can create one or more events to associate with a campaign. An event associated with a campaign, or created as an independent event.

Prerequisites

The user must have user permissions.

Steps

1. From the Events window, choose **Create**. The Event Create screen appears.
2. Choose the **Setup Type** and provide a **Name** for the event.
3. Enter the **Start Date**, **End Date**, and **Duration** for the event.
4. Choose the event **Type**, enter a **Source Code**, and assign the **Priority** to convey the importance of the event.
5. Choose the **Budget Amount** currency and click **GO** to find the budget fund that will finance event costs.
6. Enter the **Owner**.
7. Optionally, enter a **Description** of the event.
8. Select **Create** to create the event.

Editing or Viewing an Event

Continue the job of creation by adding details to an event, or view event details for possible editing.

Prerequisites

The user must have user permissions.

Steps

1. From the Events window, choose **Events**. The **Events** screen appears.
2. Select the **Event Name** hyperlink for the event of interest.

   To search for the event, choose the **View** category (My Event, All Events, etc.), designate how the search is **Sorted By** and select **GO.**

3. Event details appear. Event detail categories are:
   - Event Details (the initial screen)
   - Event Segment Details
   - Event Campaign Details

- Event Agenda Details
- Event Offering Details
- Event Costs Details
- Event Metrics Details
- Event Response Details
- Event Team Details
- Event Products Details
- Event Notes Details
- Event Collateral Details
- Event Attachments Details
- Event Tasks Details
- Event Message Details

Event Details

1. Enter required detail information in all required fields (those denoted by an asterisk).

   Required information includes:

   * **Name** of the event.
   * **Type** of event.
   * **Start** and **End** dates
   * Source Code

2. Enter optional information including:

   * Event **Status**, active, planning, or otherwise.
   * **Duration** of the event in Days or other selected time measure.
   * Assigning the appropriate **Priority** to express the importance of the event.
   * **Budget Source** Locate the **Budget Source** to fund the event. Choose from those listed or enter a search string and select **GO**.

Note: An event can be funded by a campaign, a fund, or a master event.

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* **Budget Amount** in the appropriate currency.
* Enter the **Owner**, or enter a search string and select **GO** to search.
* The **Category** into which the event falls.
* A **Description** of the event to help contributors and decision makers understand what is planned.
* **Check Boxes** check those that apply including **Registration Required** if it applies.

3. Select **Update** to save these event details.

Event Segment Details

Enter details about the audience segment that this event is targeted toward.

1. Navigate to the Event Details screen and select **Segment**. The event Segment details screen appears.
2. Select the segment **Name**.

Event Campaign Details

Specify the campaign to associate with this event.

1. Navigate to the Event Details screen and select **Campaign**. The event Campaign details screen appears.
2. Select the campaign **Name**.

Event Agenda Details

Enter details about the agenda for the event.

1. Navigate to the Event Details screen and select **Agenda**. The event Agenda details screen appears.
2. Provide details on what is planned to occur for each **Day** of the event, the **Track** or sequence of activities, the planned **Start** and **End Time**, and the **Name** of the presenter or facilitator for that segment. Set the **Status** if desired.
3. Select **Update** to save event details.

Event Offering Details

Offerings inherit the Agenda from the Event. The Offering can be edited and more detail can be added.

An offering is the child of an event. For example, a conference may take place in two different venues — like California and Florida. California and Florida are both offerings of the parent conference event.

A one-off event is an event that has only one offering.

1. Navigate to the Event Details screen and select **Offerings**. The event Offerings screen appears.
2. To edit offering details, select a new **Status** or change the **Start** or **End Date** as appropriate.
3. To view offering details, select the hyperlink for the offering of interest.
4. To create an offering, select **Create**. The Create Event Offering screen.
5. Enter required detail information in all required fields (those denoted by an asterisk).

   Required information includes:
   * **Name** of the event.
   * **Type** of event.
   * **Start** and **End** dates
   * Source Code
6. If desired, enter the following optional information:
   * Event **Status**, active, planning, or otherwise.
   * **Duration** of the event in Days or other selected time measure.
   * Assigning the appropriate **Priority** to express the importance of the event.
   * The **Language** that the offering will be presented in.
   * **Time Zone** the venue is in.
   * **Budget Source** Locate the **Budget Source** to fund the offering. Choose from those listed or enter a search string and select **GO**.

Note: An event can be funded by a campaign, a fund, or a master event.

- * **Budget Amount** and choose the appropriate currency.
- * The **Category** into which the offering falls.
- * A **Description** of the offering to help contributors and decision makers understand what is planned.
- * **Check Boxes** check those that apply including **Private, One Time Only** etc.

7. Select **Update** to save these event details.

Event Costs Details

1. Navigate to the Event Details screen and select **Costs**. The event Costs screen appears.
2. Enter or choose a **Cost Name**, then provide values in the **Unit**, **Forecast,** and **Actual** fields.
3. Select **Update** to save event details.

Event Metrics Details

1. Navigate to the Event Details screen and select **Metrics**. The event Metrics screen appears.
2. Enter or choose a **Metric Name**, then provide values in the **Unit**, **Forecast,** and **Actual** fields.
3. Select **Update** to save event details.

Event Response Details

1. Navigate to the Event Details screen and select **Response**. The event Response screen appears.
2. Identify the **Script** to be used when soliciting for a response. Then specify the response communication means; **Phone**, **Email, URL**.
3. Select **Update** to save event details.

Event Team Details

1. Navigate to the Event Details screen and select **Team**. The event Team screen appears.
2. Identify the **Role**, and enter or search for a **Name**.
3. Select **Update** to save event details.

Event Products Details

1. Navigate to the Event Details screen and select **Products**. The event products screen appears.
2. Assign the **Level** for the product. Enter or search for a **Category** and **Product**.
3. Select **Update** to save event details.

Event Notes Details

1. Navigate to the Event Details screen and select **Notes**. The event notes screen appears.
2. Select the **Note Type** and enter notes about the event as appropriate.
3. Select **Update** to save event details.

Event Collateral Details

1. Navigate to the Event Details screen and select **Collateral**. The event collateral screen appears.
2. Select the **Collateral Type** and enter or search for the collateral **Name**. Choose the **Usage**, specify the **Quantity** and provides the relevant dates the collateral is needed and should be delivered.
3. Select **Update** to save event details.

Event Attachments Details

Select the attachments, if any, to associate with the event.

1. Navigate to the Event Details screen and select **Attachments**. The event attachments screen appears.
2. Enter or search for the attachment **Name**. Choose the attachment **Type**.
3. Select **Update** to save event details.

Event Tasks Details

Specify the tasks that must be done for this event, and include associated details including the persons assigned to do them.

1. Navigate to the Event Details screen and select **Tasks**. The event tasks screen appears.
2. Enter a name for the **Task**. Select the task **Type**, **Priority**, and **Status**. Choose the appropriate dates and assign an individual to do the task.
3. Select **Update** to save event details.

Event Message Details

Choose the message to associate with this event.

1. Navigate to the Event Details screen and select **Message**. The event message screen appears.
2. Choose the **Message Type** and **Message** to associate with this task.
3. Select **Update** to save event details.

Event Offering Agenda Details

Enter the agenda for the offering.

1. Select **Agenda**. The Event Offering Agenda screen appears.
2. Select the agenda **Track**(s).

Event Offering Invitation List Details

Enter the invitation list information.

1. Select **Invite List**. The Event Offering Invitation List screen appears.
2. Select the pop up lists and choose those to be invited to this offering.

Creating a One-Off Event

Create an event to occur one time only.

Prerequisites

The user must have user permissions.

Steps

1. Access the Event Details.
2. Check the **One Time Only** checkbox.
3. Select **Update** to save these event details.

Associating an Event With a Campaign

Choose the campaign to associate with the event.

Prerequisites

The user must have user permissions.

Steps

1. Select the **Campaign Type**.
2. Enter the **Campaign Name**. Enter the name, or enter a search string and select **Go** to find the campaign.
3. Select **Update** to save these event details.

Managing Event Offering Registration

Events is integrated with the Telesales application that is used to accomplish event offering registration. If desired, the user can import registration from another source or out source event registration.

Prerequisites

The user must have user permissions.

Steps

1. Select **Registration**. The **Event Offering Registration Setup** screen appears.
2. Declare the total number of registrants that will be accepted. To do this, enter the **Maximum Size**.
3. Define the period during which enrollments are accepted by selecting **Enrollment Starts** and **Enrollment Ends** dates. Specify the **Time Zone** to further clarify the dates.
4. Registration and attendance details:

   a. You may choose to not allow event registration to be overbooked. If so, check the **No Overbooking** check box.
   b. If overbooking is allowed, enter a value in the **Overbooked by** field to specify by what percentage.
   c. Similar to overbooking, if attendance will be allowed to exceed the planned number, check the **Allow Overflow** checkbox.
   d. Even though registration may be full, you can check **Waitlist Enabled** to continue to allow registrant application for attendance to continue. If so checked, specify allowed size of the waitlist by entering a percentage value in the **Waitlist** field. If a further rule is to apply to the waitlist, select the **Waitlist Rule**.
   e. Choose a date for the **Attain Minimum by** field if you want to have a time by which you can decide the event really viable, or that you can replan the event if necessary.
5. Cost and payment details:
   a. If the attendee cost is based on a list, select the applicable **Price List**.
   b. If the **Event Price** is to be specified here, enter an amount and the applicable currency.
   c. For non cash payment, select the **Credit Type** that will be accepted for payment. Enter any **Credits** that will be accepted.
   d. Enter the **Inventory ID** if it applies.
6. Select **Update** to save these details.

Event Offering Products Details

Enter the products that this offering is meant to promote.

1. Select **Products**. The **Event Offering Products** screen appears.
2. Select the product **Level** for this offering.
3. Enter or search for the product **Name**.

Event Offering Resources Details

Enter the resources for the offering.

1. Select **Resources**. The **Event Offering Resources** screen appears.

2. Select the appropriate resources **Type**, **Role**, **Name** to use for this offering. Provide information on the quantity, **Status** and associated dates.
3. Select **Update**.

Event Offering Collateral Details

Enter the agenda for the offering.

1. Select **Collateral**. The **Event Offering Collateral** screen appears.
2. Specify the collateral to associate with this event offering.
3. Select **Update.**

Event Offering Notes Details

Enter the agenda for the offering.

1. Select **notes**. The **Event Offering Notes** screen appears.
2. Enter notes that will clarify this event offering.
3. Select **Update**.

Event Offering Team Details

Enter the agenda for the offering.

1. Select **Team**. The **Event Offering Team** screen appears.
2. Enter details to specify the team.
3. Select **Update**.

Event Offering Costs Details

Enter the agenda for the offering.

1. Select **Costs**. The **Event Offering Costs** screen appears.
2. Enter details to specify the costs.
3. Select **Update**.

Event Offering Metrics Details

Enter the agenda for the offering.

1. Select **Metrics**. The **Event Offering Metrics** screen appears.
2. Enter details to specify the metrics.

3. Select **Update**.

Event Offering Campaign Details

Enter the manner in which this offering is to be marketed.

1. Select **Campaign**. The **Event Offering Campaign** screen appears.
2. Enter details to specify the campaign to associate with this offering.
3. Select **Update**.

Event Offering Segments Details

Enter the agenda for the offering.

1. Select **Tasks**. The **Event Offering Segments** screen appears.
2. Enter details to specify the audience segments this offering is targeted toward.
3. Select **Update**.

Event Offering Tasks Details

Enter the agenda for the offering.

1. Select **Tasks**. The **Event Offering Tasks** screen appears.
2. Enter details about the tasks that must be accomplished for this offering.
3. Select **Update**.

Event Offering Response Details

Enter the agenda for the offering.

1. Select **Response**. The **Event Offering Response** screen appears.
2. Enter details to specify how the response is sought.
3. Select **Update**.

Event Offering Attachments Details

Specify the attachments to use for the offering.

1. Select **Attachments**. The **Event Offering Attachments** screen appears.
2. Specify the attachments to associate with this offering.
3. Select **Update**.

Event Offering Message Details

Enter the message to associate with the offering.

1. Select **Message**. The **Event Offering Message** screen appears.
2. Specify the message to associate with this offering.
3. Select **Update**.

Managing Budgets

Prerequisites

A marketing object (campaign event) must exist. The campaign event may be funded by

- other marketing objects, or
- directly by a budget owned by an individual within the organization **Example** Vice President of Marketing

Viewing a Budget

Editing a Budget

Creating a Budget

Viewing a Budget

Prerequisites

The user must have user permissions.

Steps

1. From the Budget window, choose **Budgets**.
2. Select the budget of interest from those listed. The budget details screen appears.

Editing a Budget

Prerequisites

The user must have user permissions.

Steps

1. From the Budget window, choose **Budgets**.
2. Select the budget of interest from those listed. The budget details screen appears.
3. Edit the budget.
4. Select **Update** to save budget revisions.

Creating a Budget

Prerequisites

The user must have user permissions.

Steps

1. From the Budget window, choose **Create**. The budget create screen appears.
2. Enter Budget Details.
3. Select **Create** to create the budget.

Managing Audience

Editing or Viewing an Audience

Creating an Audience

Using Templates

Editing or Viewing an Audience

The user creates a List of Customers and then uses that list to contact Customers, and to act on customer response.

Prerequisites

The user must have user permissions.

Steps

1. From the Audience tab, choose **Audience**. The Audience screen appears.

2. Select the **Name** hyperlink for the audience of interest. The list details screen appears.

3. View the audience details. If desired, edit the values for details in this screen. Use the procedure found in Creating an Audience.

Creating an Audience

Prerequisites

The user must have user permissions.

Steps

1. From the Audience tab, choose **Create**. The Create List screen appears.

2. Enter the list **Name.** Make it a name that reflects the kind of Customers the audience will contain.

3. Select the list **Type**. Examples include Control and Prospect.

4. Assign a **Status** to the audience.

5. Enter or search for the audience **Owner**.

6. Provide the List Details:

   a. To have reports generated, check the **Enable Log Reports** check box.

   b. If you want the deduplication operation to be performed at the time of list generation, check the **DeDupe at Generation** checkbox.

   c. If a rule is to apply to list generation, select the **Rule**.

   d. To assess words having the same or similar meaning and replace them with common, preferred words, check the **Use Word Replacement** check box.

7. Specify the Selection Criteria:

   e. Assign the **Action** to be performed on the Workbook or existing List. Actions are:

      * **Include** Include all the customers defined by the list or workbook.

      * **Exclude** Exclude all the customers defined by the list or workbook.

      * **Intersect** The output of this operation will be all customers in this workbook or list that match the previous selection.

The action defines the operation performed on customers returned by the Workbook or that are included in an existing list:

The first row must always be Include.

Subsequent rows are assigned any action, including Include, Exclude and Intersect.

f. Designate the **Type** of source to use for the Action. Choices are:

  * **Workbook** A workbook that has been created.
  * **List** An existing list.
  * **Target Market** A list of pre-defined persons included as *default* customers in a list.
  * **Market Segment** The source segment of the market.

g. Enter or search for the **Name** for the item of the Type selected above.

h. With regard to deduplication (**DeDupe**), enter a number to specify the importance in terms of **Rank** this workbook in relation to other workbooks used for this list. Rank is invoked to selectively cull out and de-duplicate customers appearing in more than one list. The customer is retained from the desired (higher ranking) list. Rank is keyed off of the Max Entries field.

i. Enter a value for the **Percentage** of candidates (from among all eligible) to be picked for the list.

8. Place constraints on the List Size:

   a. Enter values for the **Size Selection**. The values would dictate the **Maximum** or **Minimum** number of list candidates in the list, or a **% of Records** in the list.

   b. Specify the **Selection Method** where:

      * Top Down means pick all candidates.
      * **Every** where the value designates that the list candidates is picked on the basis of one from **Every Nth** rows.
      * Random invokes random picking of list candidates. This is performed on a percentage basis.

9. Enter Notes about the list as appropriate. Select the **Note Type** and then enter text for the note.

10. Select **Update** to save audience details.

Using Templates

A template is assigned to lists to govern how customers and customer information are displayed in the generated List. The template is a created in Discoverer.

Prerequisites

The user must have user permissions.

Steps

1. Select the **Audience** tab and choose **Import.** The import screen appears.
2. Select the **Name** of the template to import. Use a name that is descriptive of the list content or purpose.
3. Assign the **Status**.
4. Choose the source of the imported list. Enter or search for the **Vender** name.
5. Enter the **Loaded Date** the template is loaded.
6. Enter a value in the **Loaded Num. of Rows** field to designate how many rows are used to generate the list.
7. Enter the currency and **Cost** of the imported template.
8. Select the **Expiration Date** — the date upon which the list will expire.
9. Designate the **Purge Date** — the date upon which the list will be purged.
10. Enter a **Description** for the template. Clearly describe the purpose and expected content of the list.
11. Define the Import Parameters:
    a. Enter the **File Name**.
    b. Choose the **Mapping Template** to use for importing.
    c. Specify the number of **Rows to Skip**. This value establishes the 1-of-n interval used to select harvest candidates for the list.
    d. Specify how columns are delimited using the **Column Delimiter** check boxes.
12. Select **Update** to designate the new template as the one to use when creating this list.

Using Resources

Prerequisites

The user must have user permissions.

Steps

1. Access the Event Offering Resources Details.
2. Select the appropriate resources **Type**, **Role**, **Name** to use for this offering. Provide information on the quantity, **Status** and associated dates.
3. Select **Update** to save these event details.

Using Scripting

Prerequisites

The user must have user permissions.

Steps

1. Access the Event Response Details.
2. Enter or search for the **Script**.
3. Select **Update** to save these event details.

Managing Messages

Viewing or Editing a Message

Creating a Message

Viewing or Editing a Message

Prerequisites

To view: User must have user permissions.

To Edit: The user must own the campaign or have the required access privileges.

Steps

1. From the Campaign window, select the **Message** tab.
2. Select the hyperlink for the message of interest. The message details screen appears.
3. View the message details. Edit the details as appropriate.

Creating a Message

Create a message to be available for use with campaigns or events.

Prerequisites

The user must have user permissions.

Steps

1. From the Message window, select **Create**. The Create Message screen appears.
2. Enter the message **Name**.
3. Enter the **Effective Dates** during which this message applies.
4. Select the message **Type**.
5. Enter the name of the message **Owner**.
6. Provide a **Description** of the message (optional).
7. Designate the products to which this message applies:
    a. Select the product **Level**.
    b. Enter or search for the product **Name**.
8. Select **Update**.