Oracle® Marketing Online

Concepts and Procedures

Release 11*i*

November 2000

Part No. A86674-01

Oracle Marketing Online Concepts and Procedures, Release 11*i*

Part No. A86674-01

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Preface

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

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

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

Structure

This guide is written and optimized for online help. This means that it is written in short self-contained topics which are linked together with hyperlinks. The topics are optimized for online delivery. This means that this guide is best read in the PDF format. Printing this document makes it impossible for you to follow the hyperlinks between topics.

The topics in this guide are organized in the following topic groups rather than in chapters:

- “Understanding Oracle Marketing Online” 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 Online” provides process-oriented, task-based procedures for using the application to perform essential business tasks.
- “Administering Oracle Marketing Online" provides task-based procedures for required for ongoing application maintenance.

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

Intended Audience

The Understanding and Using topic groups of this guide are aimed at the following users:

- All marketers using the application
- Marketing application administrators

The Administering topic group is aimed at:

- Power users of the application
- Marketing application administrators

The Implementing topic group is to be used by experienced system administrators and Oracle implementation consultants who understand Oracle ERP applications only.

> **Note:** You must be an experienced system administrator and have an understanding of Oracle ERP applications before proceeding with the procedures in the Implementing topic group.

Related Documentation and Resources

The following documents are useful for implementing Oracle Marketing Online:

Oracle Applications Concepts (A82932-01)

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind and major issues for applications-wide features such as Business Intelligence (BIS), languages, character sets, and self-service applications. It also describes Forms-based and HTML-based products.

Oracle Applications System Administrator's Guide (A75396-02)

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing. It also includes information relevant for setting up dbc files for Oracle Web Discoverer.

Oracle Pricing User's Guide (A77032-01)

Implementers will need this guide to set up pricing features of the Oracle Marketing Online.

Oracle System Administrator's Guide (A75396-01)

The Implementation Appendix of this guide gives valuable information on implementing Oracle applications.

Implementing CRM Applications Release 11i (A85301-01)

This guide outlines the steps required for implementing the Oracle Marketing Encyclopedia System.

CRM Foundation Implementation Guide (A86122-01)

This guide outlines the steps required to implement the foundation components of the CRM suite of applications.

Oracle Inventory User's Guide (A83505–01)

This guide outlines the implementation steps required to set up Oracle Inventory.

Discoverer 3i Installation & Administration Guide Release 3.3 for the Web (A66104-02)

This guide outlines the implementation steps for Oracle Web Discoverer.

BIS11i Implementation Guide (A77481-02)

This guide outlines the steps required to create the End User Layer (EUL) and import EUL Export File (EEX) for Oracle Web Discoverer.

Understanding Oracle Marketing Online

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

Oracle Marketing Online functionality is organized by the following major tabs:

- **Campaigns**: This is where you organize your campaigns and track related tasks, assignments, activities, creative material, and other elements designed to promote or sell concepts, products, and services.
- **Events**: This is where you set up and track trade shows, product launches, seminars, and other such activities that are created and executed to support a campaign
- **Audience**: This is where you set up lists, segments, or queues of prospects and customers toward which marketing activities are directed.
- **Deliverable**: This is where you associate creative material that carries or presents the message of the campaign to the prospective customer.
- **Budget**: This is where you allocate budgets to finance a campaign or event.
- **Message**: This is where you create company messages you can attach to a campaign.
- **Admin**: This is where you and the application administration team create venues, marketing mediums, and other setups.

About Navigating Through Oracle Marketing Online

You navigate through the application by clicking on the tabs, subtabs, buttons, and check-list attributes.

This topic introduces some of the Oracle Marketing Online user-interface elements and explains how they are used. The topics covered are:

Interface Element (Click for information)	Brief Explanation
Tabs and Subtabs	Three levels of tabs provide navigation through the application.
Check Lists	Contain categories of information users must enter for an object such as a campaign or event. Each item in the check list is called an attribute. It becomes checked off when you make an entry.
Folders	Display the hierarchical structure of information. They show, for example, which metrics summarize others and how metrics relate to each other.
Bins	Provide shortcuts to recently-visited objects from the Home tab.

Tabs and Subtabs

There are two types of window arrangements in Oracle Marketing Online:

- Windows with three levels of tabs
- Windows with two levels of tabs and a check list

Windows with Three Levels of Tabs

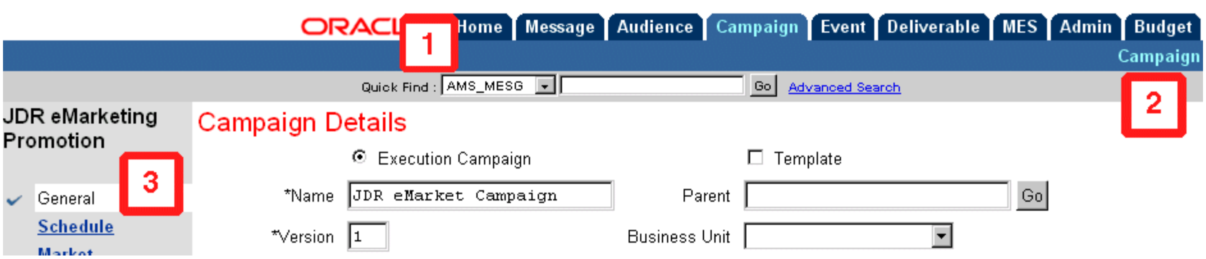
Some windows use up to three tab levels to control what is displayed in the window.

Here are the three types.

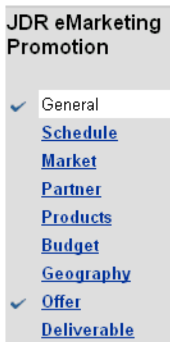
Number	Interface Object	Description
1		Tabs. The active tab appears in a different color than the other tabs.
2		Level 1 subtab. The name of the active subtab appears highlighted.
3		Level 2 subtab. These subtabs are hyperlinks. The active subtab appears highlighted.

Windows with Two Levels of Tabs and a Check List

Some windows can have up to two levels of tabs and a check list.



Here are the three types.

Number	Interface Object	Description
1		Tabs. The active tab appears in a different color than the other tabs.
2		Level 1 subtab. The name of the active subtab appears highlighted.
3		Check list. The selected check-list attribute is highlighted. A check mark appears next to an item after you make an entry in any of the fields of that item. A check mark does not mean all the required fields have been filled out.

References

How This Help System Represents Navigation Paths

Check Lists

A check list organizes the information your team enters and tracks in a campaign, an event, a deliverable, an offer or another object. Each item on the check list, called an attribute, represents a type of information you wish to track or action you wish to take. For example, a product launch campaign requires you to enter information about the products the campaign is targeting in the Products check-list attribute. To schedule an activity such as an email blitz, you go to the Schedule check-list attribute.

A check mark next to a check-list attribute indicates someone in your team or the application itself has entered information there. The check mark does not indicate that the information is accurate or complete.

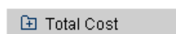
Using the Admin tab, application administrators create Custom Setups which determine what items appear in the check list for campaigns and events and the order of the attributes in the list. All other check lists have a fixed list of attributes that cannot be modified.

Note: The General check-list attribute is not an attribute. It is the Detailed subtab where you enter general information about the campaign, event or another object.

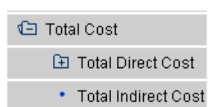
Folders

Oracle Marketing Online uses the folder metaphor to display the parent-child relationship between objects.

Parent objects, such as summary metrics and costs, are represented by folders with a plus sign:

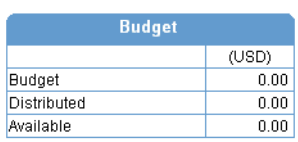


Clicking on the folder icon displays the child objects indented below. For example, clicking on the Total Cost metric displays the metrics it summarizes:



Bins

Bins are the regions of the Home tab that display information on budgets, campaigns, deliverables, and rollup events. Here is the Budget bin, as an example:



Budget	
	(USD)
Budget	0.00
Distributed	0.00
Available	0.00

How This Help System Represents Navigation Paths

Here is the convention used by this documentation to describe user navigation:

- **Tab > subtab1 > subtab2**
- **Tab > subtab1 > check-list attribute**
- **Tab > Create:** Select the tab and click the Create button. For instance, to create a new campaign, the user selects the Campaign tab and clicks **Create**.

Understanding Campaigns

You construct campaigns using two building blocks:

- Rollup campaigns
- Execution campaigns and marketing mediums

Rollup Campaigns

You use rollup campaigns to track the general information about a campaign and to build a hierarchy of rollup campaigns in your organization. The hierarchy, which you build by linking one rollup campaign to another, determines how budgets are approved and allocated and how costs and metrics are reported in your organization.

You also use rollup campaigns to group similar execution campaigns. For example, if your company is promoting a new product through an email campaign, and a combination of print and television advertising, then you may create a separate rollup campaign for each type of marketing mediums: one for email, one for print, and one for television. Each rollup campaign can contain as many execution campaign as you like, each with details on the particular advertisement or email you are sending out.

Execution Campaigns and Marketing Mediums

An execution campaign is where you store information on how a campaign is executed through a marketing medium. A marketing medium is the marketing channel for your marketing activity. It is the specific magazine or television station where you advertise or the telemarketing center executing your campaign.

An execution campaign can hold information on only one marketing medium. This means that you must create a separate execution campaign for every marketing medium you are using for the campaign. For example, if you are promoting a product through magazine advertisements, then you must create a separate execution campaign for each magazine where you are running the advertisement.

You can associate an execution campaign with a parent rollup campaign but not with another execution campaign. You cannot build a hierarchy of execution campaigns. Execution campaigns are always at the bottom of any rollup campaign hierarchy you create.

See Also

About Campaign Hierarchies

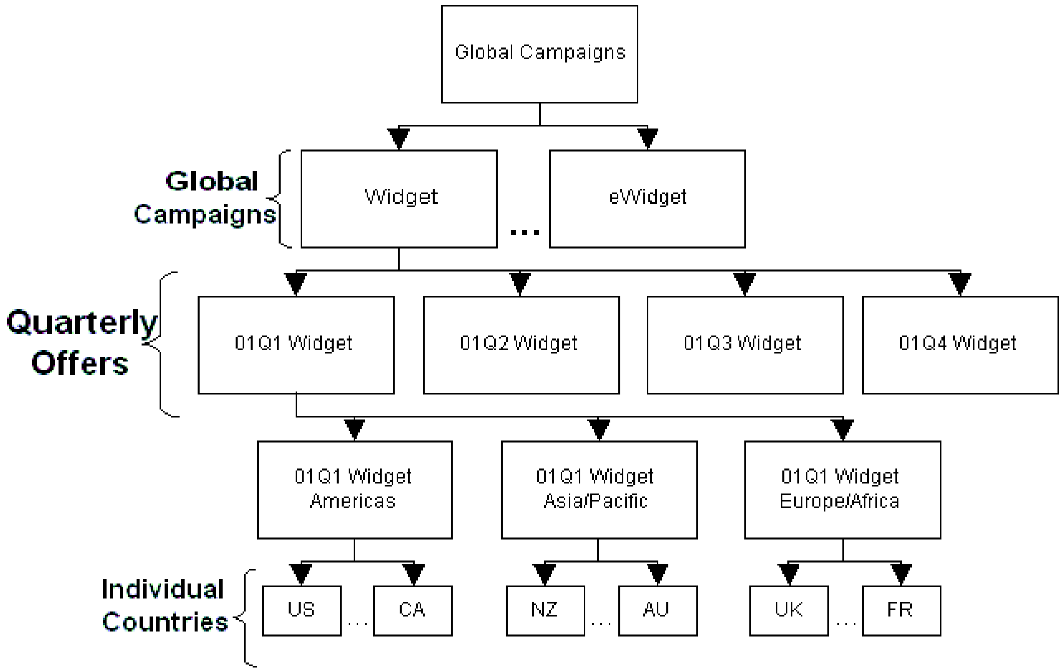
About Naming Campaigns

About Campaign Hierarchies

Because the campaign hierarchy you create determines how budgets are dispersed and information is gathered about performance of campaigns, it must reflect your business structure.

Consider a multinational company with a global campaign for two products: Widget and eWidget. The company has three regional offices for the Americas, Asia Pacific, and Europe Africa as well as branches in major countries. The company changes campaigns quarterly.

The resulting campaign hierarchy may look something like the one in the following diagram. You should note that all of the campaigns shown in this diagram are rollup campaigns. Each country tracks their own marketing activities by setting up execution campaigns.



About Naming Campaigns

Your organization must use a naming convention that makes it easy to distinguish between campaigns. This is because all campaigns appear alphabetically on the same list regardless of their position in the campaign hierarchy.

For example, you may want to adopt a naming convention similar to the following:

<year><quarter><product><region or country>

"01Q1 Widget Americas" then becomes the campaign for the first quarter of 2001 for the product Widget for the Americas region.

You can view where a particular campaign is in the campaign hierarchy by examining its Parent field.

How Campaigns Are Approved

Campaigns are approved according to predefined business rules entered in Oracle Workflow. Oracle Marketing Online provides a predefined Workflow that automatically sends campaigns for approval when you change a campaign status to the appropriate level. There are two types of approvals:

- Campaign theme approval
- Campaign budget approval

The application administrators must enable the two approval work flows in the Admin tab when they are setting up the campaign types.

Campaign Theme Approval

When you change the status of a campaign from New to Planned, Oracle Marketing Online sends a request for approval either to the owner of the campaign if you are not the owner, or, if you are the owner, to the person who is listed as your supervisor in Oracle Human Resources. The application automatically changes the campaign status to Submitted for Approval. You receive a notification in your Personal Home Page when the campaign owner or your supervisor approves or rejects the campaign. If the campaign is approved, the status changes to Planned. If the campaign is rejected, then the status becomes Denied Theme Approval.

Campaign Budget Approval

When you change the status of a campaign from Planned to Active, Oracle Marketing Online sends to the budget owner a request for approval of the budget amount you have entered in the Budget check-list attribute. If the budget for your campaign comes from a rollup campaign rather than a budget, then the person approving your request is the owner of that rollup campaign. The campaign status changes to Submitted for Budget Approval. You receive a notification in your Personal Home Page if the budget owner approves or rejects the campaign. If the budget is approved, then the status of the campaign becomes Available. If the budget is denied, then the status becomes Denied Budget Approval.

Understanding Budgets

Budgets are the source of funding for marketing campaigns, events, and deliverables. Only a few marketing managers within your organization have the permission to create budgets. Marketers can only request funds from an existing budget.

Marketing managers can create a budget hierarchy by associating budgets with a parent budget. When you create a budget that is a child to a budget you do not own, then the owner of the parent budget is automatically notified of your request for funding. A budget can become active, and used for funding campaigns only after your request is approved. Funds are automatically deducted from the parent budget when the child budget is approved.

Ideally, the budget hierarchy should match the campaign hierarchy that uses it. That way a marketer creating a campaign or an event knows from which budget to request funds.

When the budget owner approves a budget request for a campaign or an event, that amount is set aside from the budget. It cannot be released unless the campaign or event status is set to cancelled.

Costs incurred by campaigns, events and other marketing activities are not tied to budgets so they are not deducted.

Understanding Tasks

A task is a job that is planned, created and then accomplished by the assigned individual or group in furtherance of a campaign or event.

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

- Lunch
- Presentation
- Execution
- Milestone

Task status is monitored through email alerts and Workflow notifications that are managed by Oracle Workflow to keep approvers current on campaign progress.

Understanding Events

This topic gives an overview of event functionality and explains the differences between the two building blocks you use to set up and track events: rollup and execution events. It covers:

- Event overview
- Event building blocks

Event Overview

An event can be a seminar, a class, a product demonstration, or any other activity related to a campaign. You can create an event as a stand-alone activity or as part of a campaign. Using events a marketer can:

- Track and distribute event information. This includes information about events speakers, directions, deliverables, and budgets.
- Set up event prices and payment methods
- Manage open and restricted registration under the control of rules and lists
- Integrate with call centers and Web sites to distribute information and to facilitate registration

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

Where applicable, event payment can be processed using a credit card or purchase order. You can send enrollees event deliverables that includes descriptions, directions, maps, and cover letters.

Events tracks the number of spaces available for the event. If space is unavailable, the contact is placed on a waiting list. The application can (depending on implementation), automatically enroll a contact on a wait list if space becomes available, or notify agents through work queues to contact prospective enrollees for confirmation.

Event Building Blocks

Just as you do for building campaigns, you use two building blocks to set up and track events:

- **Rollup events**: This is a template where you enter general information about an event such as the description, costs, deliverables, venue, directions to the event, and the campaign used to promote the event. A company offering a sales seminar worldwide, for example, enters the information common to all the individual country sales seminars here. This information can then be customized for each separate country, location and time using execution events.
- **Execution events**: Allow you to customize the general information you entered in rollup events to create specific events and to track participation and enrollment in each. For example, a country manager of the company offering a sales seminar worldwide creates an execution event for the local seminar with its own times, speakers, and costs associated with each specific event.

Understanding Deliverables

A deliverable is any type of creative, advertising, or promotional material used to support the campaign. A deliverable can be:

- A physical item, such as a data sheet or a logo-bearing pen
- An electronic file, such as a banner ad, video clip, or logo design

Different Ways of Finding Information

Oracle Marketing Online provides you with three ways to find the information:

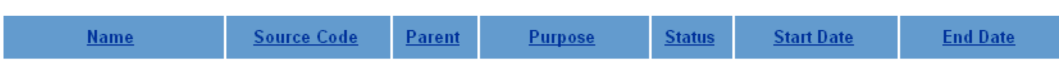
- Select a view of campaigns, events, deliverables, and other objects
- Use the Quick Find function to search information
- Perform a detailed search using Advanced Search

Different Views of Objects in the Database

When you click on a tab, the application automatically searches the database and lists all objects you can edit. For example, clicking on the Campaign tab displays the My Campaigns view listing all of the campaigns that you have created or for which you are listed as a team member.

You can change the view and query the database again by making a different selection from the View drop-down list. In the Campaign tab, for example, selecting All Campaigns displays all the campaigns you have permission to view. If you view the details of a campaign you have permission to view but not to edit, then the campaign appears as a report only.

To help you find objects, you can sort the list by clicking on a column name. Columns you can sort by appear as hyperlinks.



Name	Source Code	Parent	Purpose	Status	Start Date	End Date

If the list of objects is too long for you to find what you are looking for, you can use the quick find or detailed method to search the Oracle Marketing Online database.

You can use Advanced Search to search for messages, campaigns, deliverables, events, and lists.

Note: You cannot search within Oracle Marketing Online for notes, attachments, tasks, and other objects other than those listed above, you can find these by viewing the objects to which they are associated. Tasks can also be viewed in your Home page.

Quick Find

Use Quick Find if you know at least part of the name of the object you are looking for.

You can use the% sign as a wild card. For example, to search for a campaign, you select Campaigns and enter a partial campaign name. If you enter `Q1%`, for instance, the application returns a list of all campaigns with names that begin with Q1.

Advanced Search

Advanced Search allows you to enter the widest variety of criteria for your searches. This includes by market segment, by product and by deliverable.

See Also

Available Campaign Views

Available Campaign Views

You can display the following views of campaigns by making a selection from the View drop-down list:

- **My campaigns**: Campaigns you own or have update privileges for.
- **All campaigns**: All campaigns you can view.

- **My country's campaigns**: Lists all campaigns viewable to you in your country. You must set up your home country in the preferences page.
- **My division's campaigns:** Lists all campaigns viewable to you in the country that belong to your division. A division is one level above your country in the geographic hierarchy. For example, the Americas division may consist of USA and Canada. If you designate the USA as your home country, then this view displays all campaigns in the USA and Canada.
- **My team's campaigns:** Lists all campaigns that include you as a team member.
- **Campaign Hierarchy**: Displays the campaign hierarchy for your organization as a tree.

Who Can See Which Campaigns

Oracle Marketing Online restricts access to campaigns according to the following rules:

- You can only view a confidential campaign if you are its owner or a team member.
- If you have edit privileges to a campaign, then clicking the campaign name hyperlink takes you to the details subtab where you can edit campaign details.
- If you have view privileges only, then clicking the name hyperlink displays campaign information in a report you cannot edit.

About Offers

You can use Oracle Marketing Online to set up five different kinds of offers:

- **Accrual**: Sets up points a customer can accrue such as frequent flyer mileage. This type of offer is used only by marketers in N-tier marketing organizations.
- **Lump Sum**: This type of discount is used for N-tier marketing only. It provides the customer a lump sum amount as cash or accrual. This is usually payment for the customer's promotional activities on your behalf. For example, a soft-drink company may use a lump sum offer to pay a supermarket for promotional activities during the Olympics.
- **Off Invoice**: This is the currency amount or percentage discount that shows up on your invoice. You can set up a simple discount, giving customers a 10 per cent discount if they purchase more than $100, for instance. Or you can set up a tiered discount, giving customers a greater discount the more they buy.

- **Order Value**: This discount is contingent on the total value of the order. For example, you can specify that a customer spending $1000 or more receives a 15 per cent discount, while a customer spending more than $10,000 receives a discount of 20 per cent.
- **Promotional Goods**: This type of offer bundles promotional goods along with customer purchases. For example, a customer purchasing an ink-jet printer receives a cartridge free of charge.

About Executing Marketing Activities Through Schedules

The Schedules check-list attribute is where you enter information on campaign activities such as a mass mailing or a telemarketing campaign. The information you enter is passed on to the appropriate CRM application where these activities are carried out.

For example, you can specify an offer to automatically display on the company web site via Oracle iStore or have your telemarketing organization execute a campaign using a script you have created.

You can schedule multiple such activities for each campaign.

There are two ways you can create a schedule:

- Manually
- Using a trigger

When you create a schedule manually using the procedure outlined in Scheduling Activities for Campaigns and Events, the information about the activity becomes available to others in your organization on the dates you specify. A schedule created manually has the **Trigger** check box unselected.

You can also create a schedule automatically by creating a trigger following the procedure outlined in Triggering Campaign Actions Automatically. The application creates the schedule and executes the action when the condition is satisfied. A schedule created by a trigger has the **Trigger** check box selected.

How to Trigger an Email Blitz on the Response Rate of Another

You can trigger one email blitz based on the results of another. Suppose you are marketing a product in the United States through an email blitz and you wish to automatically trigger an email blitz in France if the level of responses reaches 5 percent.

Here is how you would set up this scenario using the Trigger function in Oracle Marketing Online.

Sample Steps

1. Create a metric called Response Rate that measures the number of responses you receive to an email blitz. This requires the help of a programmer or consultant.
2. Create a metric called "Trigger Response Rate" according to the procedure outlined in Creating metrics. In the Calculation region, select the **Enter Value Manually.** You are creating this metric only for the purpose of storing the value you wish to use to trigger the campaign.
3. Create the two email blitzes:
   a. Create the email cover letter mailmerge.
   b. Create and a list of type Template that queries the database to extract email recipients as described in Creating a List.
   c. Create an execution campaign of campaign type Direct Marketing - Email according to the procedure found in Creating an Execution Campaign.
   d. Associate the two metrics you have created to both campaigns using the Metrics check-list attribute following the procedure outlined in Determining Which Metrics You Wish to Use.
4. For the French execution campaign:
   a. Navigate to the Metrics attribute.
   b. In the Actual Value column of the Trigger Response Rate enter the number `5`.
   c. Click **Update**.
5. In the French execution campaign, create a Trigger of type meric to metric. See the procedure outlined in Triggering Campaign Actions Automatically.
6. Enter the details for the metric to metric trigger following the procedure in Entering Metric to Metric Trigger Details:
   a. For the Monitor Setup, be sure to enter the frequency you wish to check for the condition.
   b. For Metric Name, select Trigger Response Rate
   c. Select "Actual Value" as the metric type.

d. For the operator, select the smaller-than-or-equal-to symbol.
e. For object type, select Campaign.
f. For Object Name, use the list of values to enter the name of the US campaign.
g. For Metric Name (on the right side of the equation), select Response Rate.
h. For Metric Type, select Actual Value.
i. Select the **Send Notification to Owner** check box. This sends the owner a message when the blitz is executed.
j. Select the **Generate List** check box.
k. Using the drop-down list select the list of type Template you have created for the blitz.
l. Select the **Schedule for Immediate Execution** check box.
m. Click **Update**.

The Trigger checks for the condition at the times you specified in Monitor Setup. If the condition is met, the trigger creates a schedule and executes the French blitz. The emails are sent as soon as the concurrent program creates the mail merge for your list.

About List Types and Templates

You can create list of two different types using the same list creation procedure outlined in Creating a List:

- **Target**: This queries the database and generates a fixed list of customers or prospects. You can use this list to schedule campaign activities by associating the list with a campaign schedule or use it as an invite list by associating it with an execution event.
- **Templates**: Templates store both the current list of customers as well as the query criteria used to generate that list. Every time you copy or use the template, the query is run automatically and the list is refreshed from the database. This assures that you are using the most up-to-date list of customers or prospects. Create a template if you are executing the list via a campaign trigger or you wish to create a list for future reuse.

About Creating Lists

You can create a list by querying your database, from two or more existing lists, or a combination of the two methods.

This topic explains the basic process for creating a list by:

- Querying your database
- Combining two different lists
- Creating lists from multiple sources

Creating a List by Querying Your Database

The simplest form of a list is the one you create by querying your database. Creating such a list is a two-step process:

1. Using Oracle Web Discoverer, a companion application linked to Oracle Marketing Online, you create a query, called a workbook.
2. During the list creation process in Oracle Marketing Online. you select the workbook you wish to use.

When the query contained in the workbook is executed either through a campaign schedule or a trigger, it returns the customers or prospects that fit the query criteria.

Creating a List from Two Existing Lists

You can create a list by combining two existing lists. There are three different ways of combining the lists:

- Including all the customers or prospects in both lists
- Using the intersection of both lists
- Excluding the individuals in one list from those in the other list

This method of creating new lists is preferable to creating a fresh list using a workbook whenever you want to target prospects or customers in an existing list.

Suppose you have recently targeted a marketing campaign to a list of males over 30 years of age. You now wish to follow up with an upsell offer to those of them who earn over $70,000 per year.

If you create a new list that queries the database for males over 30 in this income bracket, then the resulting list will contain any new individuals matching this profile who have been added since you ran the campaign. You do not want to target these new prospects with the upsell offer because they will not be familiar with your original offer.

Creating a new list based on an intersect of the list you used for your campaign and a list of individuals over $70,000 per year limits the targets to the individuals targeted by your original offer.

About Creating Lists from Multiple Sources

You can create a list from multiple existing lists and workbooks.

The application combines any number of lists and workbooks based on the action you select for each source in the order you specify.

The available actions are the same we used to extract a new list from two existing lists in our previous example:

- Include
- Intersect
- Exclude

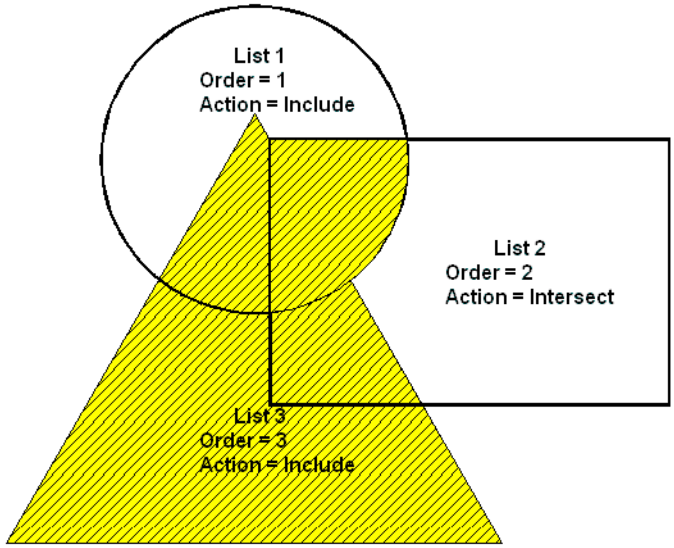
The order you specify tells the application the order in which to combine the lists.

If you are combining two lists, then the list order does not matter. An intersect between list A and list B yields the same results as an intersect between list B and list A.

But the order matters when you have more than two sources for your list. Suppose you have three different lists: 1, 2, and 3 that the application processes in the following order:

Order	List	Action
1	List 1	Include
2	List 2	Intersect
3	List 3	Include

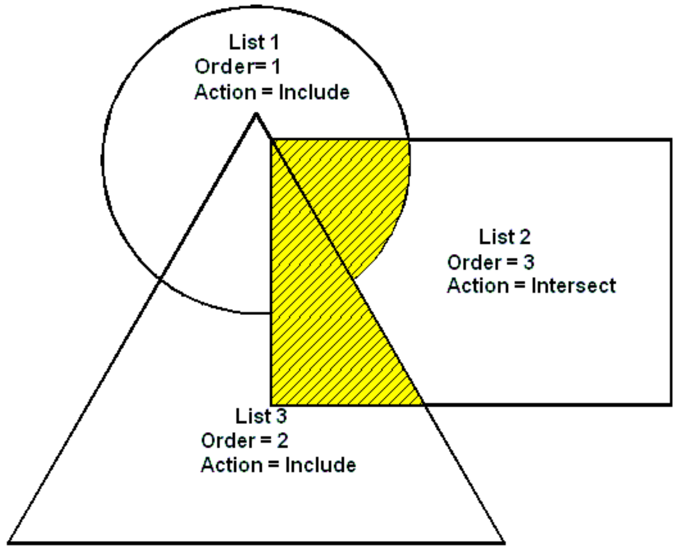
The shaded area in the diagram below represents the resulting list:



Now suppose you change the order of the lists as follows while keeping the actions the same:

Order	List	Action
1	List 1	Include
2	List 3	Include
3	List 2	Intersect

The following diagram shows the resulting list.



About Workbooks, Worksheets, and Oracle Web Discoverer

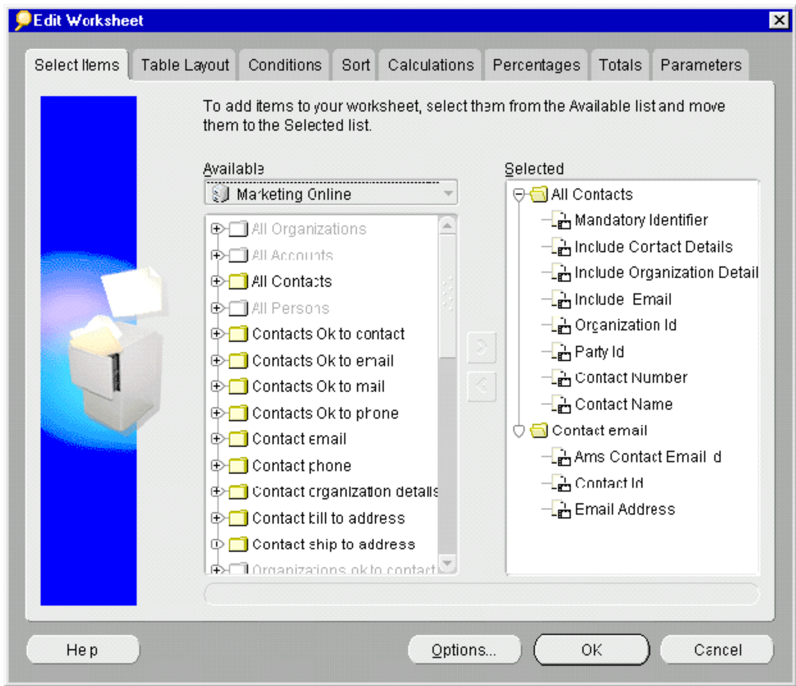
Oracle Marketing Online includes Oracle Web Discoverer, a separate application which non-technical users can use to create database queries for list creation.

This topic explains a few key terms:

- Folders, field icons, and the End User Layer (EUL)
- Worksheets
- Workbooks
- Conditions

Folders, Field Icons, and the End User Layer (EUL)

Oracle Web Discoverer's graphical user interface represents query terms as folders and field icons. Users move these from left to right to create a query:



The folders represent different views of the database. The Contacts OK to email folder, for example, lists all of the customers in the database who have indicated that they can be emailed.

The fields represent customer attributes, including name, telephone number, age, and so on.

Oracle Marketing Online application development team has created folders and fields in Oracle Web Discoverer that are specific to marketing. Together this is called the End-User Layer.

Worksheets

The query you create by moving the folders and fields to the right side of the window is called a worksheet. It is these individual worksheets that you use in the list creation process.

Workbooks

When you save the query, Discoverer automatically creates a workbook for the worksheet. In this respect, Discoverer is analogous to Microsoft Excel where each sheet is stored in a book.

If you wish, you can store multiple worksheets in a workbook. But for the purposes of Oracle Marketing Online you are better off having just one worksheet per workbook.

This is because you select individual worksheets and not workbooks for list creation.

Oracle Marketing Online does not distinguish between worksheets and workbooks. Both are called by the generic term workbook and both appear in the list of values when you add workbooks during list creation.

Conditions

You can apply a condition to the worksheet to further constrain the query. For example, if you wish to create a worksheet that retrieves only the contact and email records for one organization, the Global Enterprise organization, then the condition you will use is `Organization Name = "Global Enterprise"`.

See Also

Creating Workbooks in Discoverer

Available Mailmerge Fields

The following fields are available for use in cover letters depending on which of the two seeded queries you select:

Marketing Simple Query:

- title
- first_name
- last_name
- pin_code

Marketing Detailed Query:

- title

- first_name
- last_name
- pin_code
- inbound_dscript_name
- inbound_url
- inbound_email_id
- inbound_phone_no
- source_code
- offer_code

References

- For information on how to create a mailmerge letter using these fields, see Creating a Mailmerge Letter

Using Oracle Marketing Online

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

Using the Home Tab

Use the Home tab to read company news, manage your marketing tasks, and gain quick access to your most current campaigns and events.

You can obtain help on how to:

- Use the home tab shortcuts to recent work
- View tasks assigned to you
- Change the priority, status, and due date of your tasks
- Reassign a task to someone else

Using the Home Tab Shortcuts to Recent Work

The Home tab provides shortcuts to the campaigns, deliverables, and events you have worked on most recently. The shortcuts are generated automatically when you create or edit an object such as an event or campaign. Use this procedure to learn how to use the shortcuts.

Prerequisites

None

Steps

1. Navigate to the **Home > Home** subtab. Usually this is the subtab you see when you select the Home tab.
2. Click on a hyperlink to display the item.

Guidelines

You can specify how many most recent items you wish to see on the Home tab using the Personal preferences window.

Viewing Tasks Assigned to You

Use this procedure to view tasks assigned to you.

Prerequisites

None

Steps

1. Navigate to the **Home > Task** subtab.
2. From the View drop-down list select My Tasks.

   The list displays tasks assigned to you.
3. If you wish to limit the view further by priority or status, then use the Filter by drop-down lists.
4. If you wish to sort the tasks alphabetically by any one of the columns, click on the heading for that column. If you wish to organize the tasks by status, for example, then click on the Status column heading.

See Also

Changing the Priority, Status, and Due Date of Your Task

Changing the Priority, Status, and Due Date of Your Tasks

You can change the priority, status, and due date of your task assigned to you and to others in your team.

Prerequisites

None

Steps

1. Navigate to the **Home > Task** subtab.
2. Make sure the My Tasks is the selected view.
3. If you wish to limit the view further by priority or status, then use the Filter by drop-down lists.
4. If you wish to sort the tasks alphabetically by any one of the columns, then click on the heading for that column. If you wish to organize the tasks by status, for example, then click on the Status column heading.

5. Modify the Priority, Type, Status, or Due Date.
6. Click **Update**.

Reassigning a Task to Another Person

Use this procedure to reassign a task to another team member.

Prerequisites

None

Steps

1. Navigate to the **Home > Task** subtab.
2. Click **Reassign Assignee**.

   The Tasks subtab appears.
3. Select the task(s) you wish to reassign to another individual by selecting the **Select** check box next to each.
4. In Reassign Task to field, click **Go** next and use the list of values to enter the individual's name.
5. Click **Update**.

Setting Personal Preferences

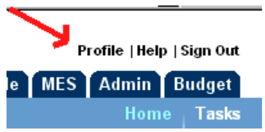
Use this procedure to change your personal preferences. This includes the number of items that appear in the lists of objects on each tab.

Prerequisites

None

Steps

1. Navigate to the General Preferences subtab by clicking on Profile at the top right of the window as indicated by the red arrow:



2. If you wish to select a different format for entering dates, then make a selection from the Date Format drop-down list.
3. If you wish to change the amount of lines the application displays in tables such as the lists of objects at each tab, then, in the Table Display region, use the Rows Per Page drop-down list to select a different number.
4. If you wish to change the number of blank lines you can use for entry in a table, then, in the Table Display region, enter that number in the Blank Rows Per Table field.
5. Click **Update**.
6. Select the Marketing hyperlink on the top left side of the window.

   The Marketing Preferences subtab appears.
7. If you wish to change the number of shortcut items that appear in each bin on the Home tab. Bins are the areas on your home tab that provide shortcuts to your most recently created campaigns, events, and other objects.
8. If you wish to view stock quotes on your home tab, then, in the User Stock Symbols text box, enter the stock ticker symbols for the companies you wish to display. Separate the symbols with a comma.
9. In the News Items per Company field, enter the number of news items to display for the companies you have entered in the previous step.
10. If desired, use the drop-down lists to define your country, time zone, and your default marketing team.
11. Click **Update**.

Using the Campaign Tab

Use the Campaign tab to manage your marketing campaigns.

You can obtain help on how to:

- View and edit a campaign

- Create a campaign
- Copy an existing campaign

For more information see:

- About campaign hierarchies
- About naming campaigns

Viewing and Editing a Campaign

Use this procedure to view and edit an existing rollup or execution campaign.

Prerequisites

None

Steps

1. Navigate to the Campaign tab.
2. If you do not see the campaign you wish to view or edit among those displayed in the list, then search for it by changing the View, or using QuickFind and Advanced Search.
3. Click on the hyperlink of the campaign you wish to view or edit.

The Campaign Details subtab displays. You are now ready to edit the campaign information.

Creating a Campaign

Use this procedure to create a campaign.

Prerequisites

Marketing mediums and campaign types must be set up first.

Steps

1. If you wish to create a campaign that is similar to one of campaigns you have already created, then copy an existing campaign and modify it instead of creating a new one.
2. If you want to create a new campaign, then navigate to the Campaign tab.

3. Click **Create**.
4. If you wish to create an element of a campaign hierarchy for reporting and tracking, then select the Rollup Campaign radio button and follow the steps in Creating a Rollup Campaign.
5. If you wish to execute an email blitz, a telemarketing campaign, a marketing campaign over the web or another marketing activity, then select the Execution Campaign radio button and follow the steps in Creating an Execution Campaign.

References

Understanding Campaigns

Creating a Rollup Campaign

Use this procedure to create a rollup campaign. A rollup campaign is used to group marketing activities tracked by execution campaigns and to build a campaign hierarchy for cost tracking, approvals, and reporting.

Prerequisites

Understanding of your organization's campaign setup

Steps

1. Navigate to the Campaign tab.
2. Click **Create**.

   The Create Campaign subtab appears.
3. Select the Rollup Campaign radio button.

   The window refreshes.
4. Use the Setup Type drop-down list to select the custom setup for the campaign. Custom setups determine what check-list attributes are required for the campaign you create. The items that appear on this list are created by the application administrator in the Admin tab.

   The window refreshes displaying different fields according to the selection you made.
5. Enter a name for the campaign. Make sure you use the naming convention set up by your organization.

6. If you are creating the top node of a campaign hierarchy, then leave the Parent field blank. Otherwise, use the Parent list of values (LOV) to associate this campaign with a campaign that is above it in the campaign hierarchy. Be sure to note the available dates of the parent campaign. The available dates for the campaign you are creating must fall within the dates of the parent.
7. If you wish to limit access to campaign information to the campaign owner and team members, then select the **Confidential** check box.
8. Enter the start and end dates you wish this campaign to be available for use. The dates must fall within the available dates for the parent campaign, if any.
9. Enter a comment and any other optional information.
10. Leave the Source Code field blank. A unique source code is generated automatically by the application.
11. Click **Create**.

    The Campaign Details subtab appears.

    You are now ready to enter more details about the campaign.

Creating an Execution Campaign

Use this procedure to create an execution campaign. Execution campaigns are where you execute campaign activities such as email blitzes and telemarketing campaigns and track information about these activities.

Prerequisites

None

Steps

1. Navigate to the Campaign tab
2. Click **Create**.

    The Create Campaign subtab appears.

3. Make sure the Execution Campaign radio button is selected.
4. Using the Setup Type drop-down list, select a custom setup. Custom setups are templates for different types of campaigns created by your application administrator in the Admin tab.

Note: If you are creating an email blitz, then you must use the custom setup Direct Marketing - Email.

The window refreshes. Notice that the window displays the activity type and activity for the custom setup you chose.

5. Enter a name for the execution campaign. Make sure you use the naming convention set up by your organization.
6. Unless you are creating a stand-alone execution campaign, you must use the Parent list of values (LOV) to associate this campaign with a the rollup campaign that is above it in the campaign hierarchy. Be sure to note the available dates of the parent rollup campaign. The available dates for the execution campaign you are creating must fall within these dates. If you are creating a stand-alone execution campaign, then you can leave this field blank.
7. If you wish to limit access to campaign information to the campaign owner and team members, then select the **Confidential** check box.
8. Enter the start and end dates you wish this campaign to be available for use. The dates must fall within the available dates for the parent campaign.
9. Enter the marketing medium for this execution campaign. This is the channel through which the campaign is delivered. For television advertisements, for example, this is the television station running your ad. For a telemarketing campaign, this is the call center making the calls. For an email campaign, this may be the server handling the emails.
10. Optionally, enter the budget for this campaign by using the drop-down list to select the currency and entering the amount. This amount is for information only. You must enter the actual amount you are requesting in the Budget check-list attribute.
11. Enter a comment and any other optional information.
12. Leave the Source Code field blank. A unique source code is generated automatically by the application.
13. Click **Create**.

    The window refreshes and the Campaign Details subtab appears.

    You are now ready to enter more details about the campaign.

Entering Campaign Details

Use this procedure to enter details for a rollup or an execution campaign you have created.

Prerequisites

You must create the campaign first.

Steps

1. Navigate to the Campaign Details subtab of the campaign you wish to edit.
2. All the required fields in this subtab were filled out when the campaign was created. You can modify them now.
3. If you are requesting funds from budgets for this campaign, then:
   a. From the Budget Amount drop-down list, select the currency.

   > **Note:** You must select a currency for you to be able to enter budget information in the Budget check-list attribute.

   b. Enter an optional amount. This amount is for information only. Requesting funds is done entirely in the Budgets check-list attribute.
4. Fill out any other optional fields.

   > **Note:** Do not modify the source code. It is generated by the system.

5. Click **Update**.

   You are now ready to enter information into the check list attributes associated with your campaign.

   These attributes appear on the left side of the Campaign Details window. What attributes are listed depends on the type of campaign you are creating.

   > **Note:** A check mark next to an attribute means that an entry has been made. It does not mean that all the information has been entered.

Guidelines:

The table below lists all check-list attributes and whether these are used for rollup campaigns, execution campaigns, or both. Rollup campaigns store only basic information about campaigns, so the number of available attributes is limited.

Only a subset of these attributes may be listed in the check list for your campaigns. This is because different types of campaigns need to track different types of information.

Attribute	Used in rollup campaigns	Used in execution campaigns
Attachments	Yes	Yes
Budgets	Yes	Yes
Costs	Yes	Yes
Deliverable	Yes	Yes
Geography	No	Yes
Market	No	Yes
Message	Yes	Yes
Metrics	Yes	Yes
Notes	Yes	Yes
Offer	No	Yes
Partner	No	Yes
Products	No	Yes
Response	No	Yes
Schedule	No	Yes
Tasks	Yes	Yes
Team	Yes	Yes
Trigger	No	Yes

Requesting Funds for Your Marketing Activities

Use this procedure to request funds from a budget or campaign for your marketing activities using the Budgets check-list attribute. In the current release you can only request funds from a single budget or campaign.

Prerequisites

- You must select the currency type for your budgets in the Campaign Details subtab
- The budget you are requesting funds from must be approved and have the status of active.

Steps

1. Use the Type drop-down list to select the type of source for your funds. Most of the time the source is a budget, but you can also request funds from a parent rollup campaign.
2. Use the Name list of values (LOV) to select the funding source.
3. In Request Amount, enter the amount you are requesting.
4. Click **Update**.

   When you change the status of a campaign from Planned to Active, Oracle Marketing Online sends a request for approval of the request to the budget owner. If the budget for your campaign comes from a rollup campaign rather than a budget, then the person approving your request is the owner of that rollup campaign. While the funds are pending, the campaign status remains Submitted for Budget Approval.

   You receive a notification in your Personal Home Page when the budget owner approves or rejects the campaign. If the budget is approved, then the status of the campaign becomes Available. If the budget is denied, then the status becomes Denied Budget Approval.

Associating Deliverables to a Campaign or Event

Use this procedure to associate deliverables to campaigns and events using the Deliverable check-list attribute. A deliverable can be a physical item, such as a brochure, or an electronic file.

Prerequisites

You must create a deliverable first before you can associate it with a campaign or event. If the deliverable is a physical object such as a brochure, then the deliverable must be an item in Oracle Inventory. If the deliverable is an electronic file, then you must enter it into the database as an attachment first.

Steps

1. Navigate to the Deliverables check-list attribute.
2. If you have not created the deliverable, then click **Create Deliverable** and following the procedure in Creating Deliverables.
3. Use the Type drop-down list to select a deliverable type.
4. Use the Name list of values (LOV) to enter the deliverable you wish to attach to the campaign or event.
5. In the Quantity field, enter the number of deliverables you need. If you are creating an electronic deliverable such as a design for an advertisement or the text of an email sent to prospects, then enter the number `1`. A numerical estimate is important only if the deliverable includes variable costs such as a printed brochure.
6. In Need by, enter the expected delivery date. This date is for information only.
7. Click **Update**.

Tracking Costs Using the Costs Check-List Attribute

Use the costs check-list attribute to track costs. Using this attribute you can:

- Determine which costs you wish to track
- Enter costs

Determining Which Costs You Wish to Track

Use this procedure to determine which costs you wish to track using the Costs check-list attribute.

Prerequisites

You must set up the cost metrics before you can associate them with a campaign.

Steps

1. Navigate to the Costs check-list attribute.
2. Select the **Detailed** radio button.

   The available cost metrics appear in the Costs region.
3. Add additional cost metrics in the Create New region:
   a. In the Name field, click **Go** and use the list of values to select the cost metric.
   b. Click **Update**.

Entering Costs

Use this procedure to enter the costs of your campaigns, events, and other objects in the Costs check-list attribute.

Prerequisites

You must associate cost metrics to a campaign before you can enter costs.

Steps

1. Navigate to the Costs check-list attribute.
2. Select the **Input Only** radio button.

   The Costs region displays the cost metrics associated with this campaign.
3. Enter the costs:
   a. Using the Currency drop-down list, select the currency.
   b. In the Actual column, enter the cost amount rounded to the nearest currency unit. Any fractions are rounded automatically.
   c. Optionally, enter a forecast number.
   d. Click **Update**.

Using the Metrics Check-List Attribute

You can use the metrics check-list attribute to:

- Determine which metrics you wish to use

- Enter values into the metrics

Determining Which Metrics You Wish to Use

Use this procedure to associate metrics with a campaign, event, offer, or another object within Oracle Marketing Online.

Prerequisites

You must create the metrics before you can associate them with a campaign or another object.

Steps

1. Navigate to the Metrics check-list attribute.
2. Select the **Detailed** radio button.

   The available metrics, if any, appear in the Metrics region.
3. Add additional metrics in the Create New region:
   a. In the Name field, click **Go** and use the list of values to select the metric.
   b. Click **Create**.

Entering Values into Metrics

Use this procedure to enter values into metrics that allow manual entries.

Prerequisites

You must create the metrics and associate them to a campaign, event, or another object first.

You can only enter values into metrics that allow manual entries.

Steps

1. Navigate to the Metrics check-list attribute.
2. Select the **Input Only** radio button.

   The Metrics region displays the metrics associated with this object.

Note: If the Metrics region does not appear, this means that there are no associated metrics which allow manual data entry.

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3. Enter metric values in the Actual and Forecast columns.
4. Click **Update**.

Entering and Viewing Notes

Use this procedure to enter or view notes about an Oracle Marketing Online object such as a campaign, an event, a budget, or a message.

Prerequisites

None

Steps

1. Navigate to the Campaign Details subtab.
2. Click on the Notes check-list attribute.

   The Campaign Details - Notes subtab appears.
3. You can view existing notes at the bottom of the window under the Note History heading.
4. If you wish to enter a note:
   a. Select an optional Note Type.
   b. Enter the note.
   c. Click **Update**.

Guidelines

Notes you enter can be viewed from the campaign, event, or other object where you create them only. They cannot be viewed from other objects in the application. Only team member can view notes.

For example, If you enter a note for a rollup campaign, others in your team can only read the note when they view this rollup campaign. They cannot view the notes from the execution campaigns attached to the rollup campaign.

Using the Tasks Check-List Attribute

Using this check-list attribute you can:

- View tasks associated with the campaign, event or other object
- Assign tasks

Viewing Assigned Tasks Specific to a Campaign or Another Object

Use this procedure to view the assigned tasks for a campaign, event, or another object. This view shows all of the tasks assigned.

If you wish to view only the tasks assigned to you, then navigate to **Home > Tasks**. See Viewing Tasks Assigned to You.

Prerequisites

None

Steps

1. Navigate to the Tasks check-list attribute.
2. The subtab displays the tasks related to this object.
3. You can sort the tasks by priority or status using the drop-down lists or sort them by Name and Planned End Date.

Creating and Assigning Tasks for Specific Marketing Activities

Use this procedure to assign tasks for this specific marketing activity. The task you create is linked to the activity where you create it. For example, if you create a task while editing an event, that task will be linked to that event in the work queue of the individual you have assigned it to.

Prerequisites

None

Steps

1. Navigate to the Tasks check-list attribute.
2. Click **Create**.

   The Create Tasks subtab appears.

3. In Name, enter a few words describing the task. Think of this as the subject line of an email. You can be brief as you can explain the task in more detail later.
4. As desired, classify the task with Type, Priority, and Status.
5. In Planned End Date, enter a due date.
6. In Assignee, click **Go** and use the list of values to enter that name of the person to whom you are assigning the task.
7. Click **Create**.
8. Click on the task name to add a detailed description of the task and other details.

Adding a Description of a Task and Editing Task Details

Use this procedure to add a description and other details to a task you have created or to edit existing task information.

Prerequisites

You must create the task first.

Steps

1. Navigate to the Update Tasks subtab. You can reach it by clicking on a task name in the list of tasks.
2. You can enter a detailed description explaining the task in the Notes text box.
3. If you wish to keep this task private so it is not visible to others in your team, then select the **Private** check box.
4. Edit other fields.
5. Click **Update**.

Attaching Files

Use this procedure to save a file in the database and attach it to a campaign, event, a deliverable, or another object. An attachment can be a file of any size and type.

Prerequisites

None

Steps

1. Click on the Attachments attribute.
2. In an available row, click **Go** next to the Name field.

   The Deliverable Attachment Selector dialog appears.
3. Click Browse and select the file you wish to enter into the database.
4. Click **Upload**.

   If the file is large, you may be asked to wait for a few minutes.
5. Using the Type drop-down list, select the file type.
6. Click **Update**.

   The file name you just entered will turn into a hyperlink indicating that the attachment has been created.

Granting Others the Right to Edit Your Campaign, Event, or Budget

Use this procedure to grant individuals or whole teams the right to edit your campaign, event, or budget by adding their names in the Team check-list attribute.

Note: Individuals who you do not grant editing rights can view a summary of objects in the application displayed in their browsers, but they cannot view details such as notes and tasks and cannot make any changes.

Prerequisites

None

Steps

1. Navigate to the Team check-list attribute.

   The Team subtab appears.
2. If you wish to grant edit privileges to an individual, then, from the User/Role drop-down list, select User.
3. If you wish to grant edit privileges to a whole team, then, from the User/Role drop-down list, select Team.

4. Use the Name list of values (LOV) to enter the name of the person or team you are granting edit privileges.
5. If you wish this person or team to have permission to edit metrics of this campaign, then select the **Metrics** check box.
6. Click **Update**.

Specifying a Market Segment

Use this procedure to specify the market segment you wish to target with your campaign, event, offer, or budget. What you enter here is for informational purposes only. It does not trigger any seeded Oracle Marketing Online workflows.

Prerequisites

The market segments must already be created using Oracle Web Discoverer.

Steps

1. Navigate to the Market check-list attribute.

   The Market subtab appears.
2. From the Type drop-down list, select the segment type.
3. In Segment Name, click **Go** and use the list of values to enter the segment.
4. Click **Update**.

Attaching a Marketing Message to Your Campaign or Event

Use this procedure to attach your campaign or event to a marketing message. Attaching a marketing message is another way of classifying you campaigns.

Prerequisites

The marketing message must be created before you can use it to classify a campaign or event.

Steps

1. Navigate to the Message check-list attribute.

   The Message subtab appears.

2. From the Message Type drop-down list, select the message type you wish to use.
3. Use the Message list of values (LOV) to enter the name of the message.
4. Click **Update**.

Scheduling Activities for Campaigns and Events

Use this procedure to schedule a campaign activity such as an email blitz or the calling of a particular segment of your audience. You can create multiple schedules for each campaign.

If you wish to trigger an activity automatically when a specific condition becomes true, then you must instead create a trigger. When the condition becomes true, the trigger automatically creates a schedule for the activity and executes it.

Prerequisites

You must create the campaign and marketing channel first.

Steps

1. Navigate to the Campaign Details subtab.
2. Click on the Schedules check-list attribute.

   The Campaign Details - Schedule subtab appears.
3. Enter the range of dates you wish the activity scheduled. The date range must fall within the dates for the campaign. These are displayed at the top of the subtab.
4. Do not make any entries in the Source Code field. The application generates the unique identifier for the activity automatically.
5. Click **Setup**.

   The Schedule Details window appears. You are now ready to enter details for the activity you wish to schedule.

References

About Executing Marketing Activities Through Schedules

Entering Details About a Campaign Schedule

Use this procedure to enter or edit information in a schedule you have created. A schedule is an activity you have scheduled.

Prerequisites

You must create the schedule before you can enter its details.

Steps

1. Navigate to the Schedule Details attribute of a campaign. You are taken here automatically when you create a schedule. Or you reach it by clicking on the Schedule attribute from the Details subtab of a campaign and selecting the schedule you wish to edit.
2. If you wish to modify the dates this schedule will remain effective, then modify the start and end dates. The dates must fall within the effective dates for your campaign.
3. If you wish to make a deliverable, such product collateral, available to individuals who will be carrying out this marketing activity, then select that deliverable using the Deliverable drop-down list. You must create and associate this deliverable with your campaign before it appears on this list.
4. If you wish to make an offer available through your organization's web site, call center, or through other means, then choose that offer using the Offer drop-down list. The offers that appear on this list are limited to the offers you have associated with this campaign in the Offers check-list attribute. See Creating Offers.
5. If this activity involves an outbound calling campaign and you wish the call center to use a script, then click **Go** in the Script field and use the list of values (LOV) to select the script. Scripts are created using Oracle Scripting, a separate application.
6. If you wish to specify the text of the email merge letter to be sent out to your customers, then:
   a. In the Cover Letter field click **Go** and use the LOV to specify the merge letter.
   b. If you wish to specify the text of the subject line of the email, then enter it in the Subject text field.
   c. Enter the email for the sender of the email.

   d. If you wish potential customers to reply to a different person than the sender, then enter that email address in the Reply To text field.

7. In the Response region, enter information on where customers can go for more information:

   a. If you wish to publish a URL where customers can obtain more information, then enter that URL.

   b. If you wish to give your customers an email address where they can obtain more information, then enter it in the Email field.

   c. If you wish customers to call a particular number for more information, then enter the phone number.

   d. If you wish your sales organization to use a script when talking to customers who call in, then enter it in the Script field by clicking **Go** and using the LOV.

8. In the Audience region, enter the lists of prospects or customers targeted by this activity. If you are creating an email blitz, then this is the list of people to be emailed:

   a. Use the Name drop-down list to select the list.

   Note: The list you select must have the status of Active.

   b. If you wish the email campaign to be executed immediately, then select the Execute check list.

9. Click **Update**.

If you are creating an email blitz and you selected the **Execute** check box, then your email is mailmerged and sent automatically.

Note: After you have selected and executed a list for a campaign schedule, the status of the list is updated from Available to Locked. You cannot reuse the same list again with that or any other campaign schedule. If you want to use same list entries again, then create the new list.

References

About Executing Marketing Activities Through Schedules

Creating an Email Blitz

Entering Information About Campaign Geography

Use this procedure to enter in the Geography check-list attribute information that can help you track the geographical regions targeted by your campaigns.

Prerequisites

The geographical regions you can enter here must be set up by your application administration or implementation team.

Steps

1. Navigate to the Campaign Details subtab.
2. Click on the Geography check-list attribute.

   The Campaign Details - Geography subtab appears.
3. Using the Level drop-down list, select the level of the geographical area you wish to attach to this campaign.
4. In the Name field, click **Go** and use the list of values to enter the location for the level you selected in the previous step.
5. Click **Update**.
6. Repeat this procedure for all of the geographical locations you wish to attach to the campaign.

Creating Offers

Use this procedure to create discounts and offers for campaigns using the Offer check-list attribute.

Prerequisites

You can only create offers for existing campaigns.

Steps

1. Navigate to the Campaign Details subtab.
2. Click on the Offer check-list attribute.

   The Campaign Details - Offer subtab appears.

3. From the Type drop-down list select the type of offer you wish to create.
4. Enter an offer name.
5. Enter a unique offer code.
6. Enter the dates the offer will remain active. These dates must fall within the active dates of your campaign.
7. Click **Update**.
8. If you wish to add details about the offer, then click **Details** and follow the procedure corresponding to the offer type you selected:
   - Accrual
   - Lump sum
   - Off invoice
   - Order value
   - Promotional goods

Guidelines

See About Offers for a definition of offer types.

Entering the Details of an Accrual Offer

Use this procedure to enter the details about an accrual offer.

Prerequisites

You must create an offer first.

Steps

1. Navigate to the Offer Details -- Accrual subtab. From the Offer attribute, you can do so by clicking **Details** next to the accrual offer you have created.
2. Optionally, select a status.
3. Enter the dates customers can order using this offer. These dates must fall within the dates of the campaign.
4. Enter the dates customers can receive shipments for goods ordered with this offer. These dates must fall within the dates of the campaign.

5. Do not make entries in Performance Dates Between fields. These are used for N-tier marketing.
6. If you wish to restrict the offer to a product family, then:
   a. In the Product region use the Level drop-down list to select Product Family.
   b. The offer is valid for every product in the product family. If you wish to exclude certain products in the family from receiving this offer, then, after you complete this procedure, use the Products check-list attribute to exclude them.
7. If you require the customer or prospect to purchase a minimum number of products before the offer applies, then:
   a. In the UOM field, click **Go** and use the list of values (LOV) to enter the units used to measure the products.
   b. In Quantity, enter the minimum quantity your customer has to purchase for the offer to apply.
8. If you wish to tier the discounts, then select the **Tiered?** check box and follow the instruction on setting up tiered discounts using the Advanced Options check-list attribute.
9. In Base Rate, enter the amount of your discount either as an amount or as percent. You must select which you are entering from the drop-down list.
10. If there is a limit on the number of units of product an individual customer can buy using this discount, then enter that amount in the Maximum Cap field.
11. If you wish to limit the offer to only those customers within one or more market segments, then select the Market check-list attribute and enter the market segment(s). Limiting the offer to a market segment means that customers outside that market segment cannot take advantage of the offer, even if they have the offer code.
12. Click **Update**.
13. Fill in information in the other check-list attributes on the left side of the screen. You can learn about each attribute by following the appropriate link in the Guidelines section.

Guidelines

The list below includes all check-list attributes used by offers.

Depending on your implementation, only a subset of these attributes may be listed in the check list for your offer.

- Advanced Options
- Attachments
- Budgets
- Costs
- Metrics
- Notes
- Products
- Tasks

Entering the Details of a Lump-Sum Offer

Use this procedure to enter a lump-sum offer. This type of discount is used for N-tier marketing only. It provides the customer a lump sum amount as cash or accrual. This is usually payment for the customer's promotional activities on your behalf.

Prerequisites

You must create an offer first.

Steps

1. Navigate to the Offer Details -- Lump Sum subtab. From the Offer attribute, you can do so by clicking **Details** next to the offer you have created.
2. In the Performance Date fields enter the period of the promotional activity.
3. In the Lumpsum field, enter the amount to be paid to the customer.
4. From the Payment Type drop-down list, select either:
   - **Check**: This issues a check to the customer.
   - **Accrue**: This accrues the amount for later payment or use against short-payment of invoices.
5. Click **Update**.

Entering the Details of an Off-Invoice Offer

Use this procedure to enter the details about an off-invoice offer.

Prerequisites

You must create the offer first.

Steps

1. Navigate to the Offer Details -- Off Invoice subtab. From the Offer attribute, you can do so by clicking Details next to the off-invoice offer you have created.
2. Optionally, select a status.
3. Enter the dates customers can order using this offer. These dates must fall within the dates of the campaign.
4. Enter the dates customers can receive shipments for goods ordered with this offer. These dates must fall within the dates of the campaign.
5. Do not make entries in Performance Dates Between fields. These are used for N-tier marketing.
6. Specify the product or product family for this offer in the Product region:
    a. From the Level drop-down list, select Product or Product Family.
    b. If this offer is valid for a single product only, then in the Product field, click **Go** and use the list of values to enter the product.
    c. If you selected Product Family, then leave the product field blank. The offer is valid for every product in the product family. If you wish to exclude certain products in the family from receiving this offer, then, after you complete this procedure, use the Products check-list attribute to exclude them.

    Note: You can only select one product or one product family for an offer. You can use the Products check-list attribute only to exclude individual products from a products family.

7. In the UOM field, click **Go** and use the list of values (LOV) to enter the units used to measure the products.
8. If you are not entering a tiered offer, then:

   a. In Quantity, enter the minimum quantity your customer has to purchase for the offer to apply.
   b. In Base Rate, enter the amount of your discount either as an amount or as percent. You must select which you are entering from the drop-down list.
9. If you wish to tier the discounts, then:
   a. Leave the Quantity and Base Rate fields blank.
   b. Select the **Tiered?** check box.
   c. After you complete this procedure you must follow the instruction on setting up tiered discounts using the Advanced Options check-list attribute.
10. If there is a limit on the currency value of the product an individual customer can buy using this offer, then enter that amount in the Maximum Cap field. This amount is for information only.
11. If you wish to limit the offer to only those customers within one or more market segments, then select the Market check-list attribute and enter the market segment(s). Limiting the offer to a market segment means that customers outside that market segment cannot take advantage of the offer, even if they have the offer code.
12. Click **Update**.
13. Fill in information in the other check-list attributes on the left side of the screen. You can learn about each attribute by following the appropriate link in the Guidelines section.

Guidelines

The list below includes all check-list attributes used by offers.

Depending on your implementation, only a subset of these attributes may be listed in the check list for your offer.

- Advanced Options
- Attachments
- Budgets
- Costs
- Metrics
- Notes

- Products
- Tasks

Entering the Details of an Order-Value Offer

Use this procedure to enter the details about an order-value offer. This discount depends on the total value of the customer's order.

Prerequisites

You must create an offer first.

Steps

1. Navigate to the Offer Details -- Order Value subtab. From the Offer attribute, you can do so by clicking Details next to the off-invoice offer you have created.
2. Optionally, select a status.
3. Enter the dates customers can order using this offer. These dates must fall within the dates of the campaign.
4. Enter the dates customers can receive shipments for goods ordered with this offer. These dates must fall within the dates of the campaign.
5. If you have multiple levels of discounts for a product or product family, then select the **Tiered?** check box.
6. In the Discount Rules region, enter the discount level(s) for each product or product family:

   a. In the From field, enter the minimum order amount that will trigger the discount.

   b. In the To field, enter the order amount for the upper limit of the discount. Entry in this field is optional.

   c. In the Product field, click **Go** and use the list of values to enter the product or product family. If you wish to exclude individual products in the family from receiving this offer, then, after you complete this procedure, use the Products check-list attribute to exclude them.

   d. In UOM, click **Go** and use the list of values to enter the units of measure.

   e. Enter discount either as a percentage or a currency amount.

f. Repeat this procedure for each discount level and for each product or product family.

7. Click **Update.**

8. Fill in information in the other check-list attributes on the left side of the screen. You can learn about each attribute by following the appropriate link in the Guidelines section.

Guidelines

The list below includes all check-list attributes used by offers.

Depending on your implementation, only a subset of these attributes may be listed in the check list for your offer.

- Advanced Options
- Attachments
- Budget
- Costs
- Metrics
- Notes
- Products
- Tasks

Entering the Details of a Promotional-Goods Offer

Use this procedure to set up a promotional-goods offer. This type of offer bundles promotional goods along with customer purchases.

Prerequisites

You must create an offer first.

Steps

1. Navigate to the Offer Details --Promotional Goods subtab. From the Offer attribute, you can do so by clicking **Details** next to the promotional goods offer you have created.
2. If you wish to restrict the offer by the date the customer purchases the goods, then enter the date range in the Order Date From and To fields.

3. If you wish to limit the offer by the ship date of the product purchased, then enter the date range in the Ship Date From and To fields.
4. If you wish to limit the offer by the performance date, then enter the date range in the Performance Date From and To fields.
5. In the Buy region, enter the products or product families the customer must purchase to trigger the offer. Make a separate entry for each product or product family that must be purchased to trigger the offer:
   a. From the level In the Product field, click **Go** and use the list of values (LOV) to enter the product or product family.
   b. In Name, click **Go** and use the product LOV to enter the product or product family name.
   c. If you have selected a product family, and wish to exclude individual products in the family from receiving this offer, then, after you complete this procedure, use the Products check-list attribute to exclude them.
   d. Enter the quantity of the product the customer must purchase to trigger the offer.
   e. In Unit, click **Go** and use the product LOV to enter the units for the quantity.
6. In the Get region, enter information about the product or products customers receive if they make the purchases you specified in the Buy region:
   a. In Name, click **Go** and use the product LOV to enter the product name the customer will receive.
   b. Select the price list for the product.
   c. Enter the number of units of the product the customer will receive.
   d. In Discount, enter any discount either as an amount or percentage.
7. Click **Update**.
8. Fill in information in the other check-list attributes on the left side of the screen. You can learn about each attribute by following the appropriate link in the Guidelines section.

Guidelines

The list below includes all check-list attributes used by offers.

Depending on your implementation, only a subset of these attributes may be listed in the check list for your offer.

- Advanced Options
- Attachments
- Budgets
- Costs
- Market
- Metrics
- Notes
- Products
- Tasks

Entering Advanced Details for Offers

You can use this check-list attribute to:

- Enter the discounts for a tiered off-invoice offer
- Enter advanced pricing information. If you wish to set up advanced pricing using this attribute, then refer to the Oracle Pricing documentation.

Entering the Discounts for a Tiered Off-Invoice Offer

Use this procedure to enter the details about the levels of discounts available in a tiered off-invoice offer using the Advanced Options attribute.

Prerequisites

You must have selected the **Tiered?** check box when you create the off-invoice offer.

Steps

1. Navigate to the Advanced Options attribute.
2. Enter the discounts for the offer in the Discount rules region:. For each level of discount:
   a. In the From column, enter the quantity that triggers that level of discount.
   b. In the To column, enter the maximum quantity for this level of discount.

   c. If you are setting up a tiered discount for a product family, then use the Product list of values to specify the product for this level of discount and the UOM list of values for the units of measure.
   d. In the Discount field, enter the amount or percentage of the discount.
   e. Repeat this procedure for each discount level.
3. Click **Update**.

Associating Products with Campaigns, Offers, and Events

You can use the Products check-list attribute to:

- Specify products and product families you wish to either include or exclude from campaigns and events.
- Specify which individual products you wish excluded from an offer that covers an entire product family

Use this procedure to do both.

Prerequisites

You must create a campaign, event, or offer before you can associate products with it.

Steps

1. Navigate to the Products check-list attribute.
2. If you are setting up an offer and you have entered a product family in the Product region of the offer details subtab, then you can exclude individual products in that family from the offer. Here is how:
   a. From the Level drop-down list, select Product.
   b. In Name, click **Go** and use the list of values to select the product you wish to exclude from the offer. The product must be from the same product family you have selected for your offer.
   c. Select the **Exclude** check box.
   d. Click **Update**.
3. If you are specifying products or product families to associate with campaigns or events, then:

   a. From the Level drop-down list, select Product or Product Family.
   b. In Name, click **Go** and use the list of values to select the product or product family you wish add to the offer.
   c. Click **Update**.
4. If you have specified a product family for a campaign or event and wish exclude individual products from that family, then:
   a. From the Level drop-down list, select Product.
   b. In Name, click **Go** and use the list of values to select the product you wish to exclude from the offer. The product must be from one of the product families you have already entered.
   c. Select the **Exclude** check box.
   d. Click **Update**.

Triggering Campaign Actions Automatically

Use this procedure to automatically trigger a marketing action when a condition is met. For example, you can trigger an email blitz when the number of responses in another email blitz reaches a certain threshold or you can trigger an extra offer for items that have a large inventory.

When a trigger executes, it automatically creates a schedule that is listed in the Schedule check-list attribute.

Prerequisites

- Schedules and Triggers must appear among the list of attributes for your campaign.
- In Campaign Details, you must enter a currency using the Budget Amount drop-down list before creating a trigger.

Steps

1. Navigate to the Campaign Details subtab.
2. Select the Trigger attribute.
3. The Campaign Details - Trigger subtab appears.
4. Using the Comparison Type drop-down list select a category for the trigger you wish to create. (See the guidelines for an explanation)

5. Enter a name.
6. Enter dates the trigger will remain effective.
7. Click **Setup**.

   You are now ready to enter details about the trigger. In the list below, click on the type of trigger you are creating for more information.

- Date
- Metric to Metric
- Metric to Value
- Metric to Workbook

Guidelines

There are four types of triggers you can set up:

Comparison Type	Function
Date	Executes the action on the date indicated.
Metric to Metric	Executes the action based on a comparison of two metrics. For example, if the number of responses in one execution campaign is greater than the responses of another.
Metric to Value	Executes the action based on a comparison of a metric with a number. For example, when the number of responses of the campaign are greater than 5,000.
Metric to Workbook	Executes the action based on the results of an SQL query. For example, if the inventory of an item is greater than a certain number then the application applies a discount.

References

About Executing Marketing Activities Through Schedules

Entering Trigger Details

For details on how to set up a trigger, click on the hyperlink below corresponding to the trigger type:

- Date
- Metric to Metric

- Metric to Value
- Metric to Workbook

Click here to see an example of how you can trigger an email blitz based on the response rate of another email blitz.

Entering Date Trigger Details

Use this procedure to enter or edit information required to trigger an email blitz on an a date and time you specify.

Prerequisites

- You must create the Date type trigger first.
- If you wish to trigger an mail blitz to a list of prospects, then you must create that list first.

Steps

1. Navigate to the Campaign Details - Trigger subtab:
   - If you are in the process of creating a new trigger, then this subtab appears automatically when you click Setup.
   - If you are editing a trigger, then drill down on the trigger name in the list that appears when you open the Trigger attribute.
2. If you wish to use a different time zone for the trigger, then make a selection from the Time Zone drop-down list.
3. Enter the date you wish the action triggered in the Start Date field.
4. Enter a time for the activity in the field to the right of the Start Date. Use the 12-hour format (HH:MI PM).
5. Leave all other fields in the Monitor Setup region blank.
6. In the Action region, select the **Send Notification to Owner** check box if you wish to send a reminder to the owner of the campaign on the date you entered. The notification is sent to the Notifications section of the Personal Home Page.
7. If you wish to trigger an email to be sent to a list you have created, then:
   a. Select the **Generate List** check box.
   b. Enter the list name using the drop-down list to the right.

   c. If you wish to schedule the email blitz for immediate execution, then check the appropriate radio button.
   d. If you must obtain approval first then select the Execute After Approval radio button, click **Go** and use the list of value to enter the name of the person who is to approve the email blitz.
8. Do not make entries in the Mail Preference region. You can enter all of the information in the schedule created automatically by this trigger.
9. Click **Update**.
10. You are returned to the Campaign Details subtab.
11. Select the Schedule check-list attribute.
12. Click on the name of the schedule that you have just created. The name is the same as the trigger name.
13. Follow the procedure for entering schedule details to enter the information about the email to be sent out.

Entering Metric to Metric Trigger Details

Use this procedure to enter or edit information required to trigger an email blitz when a metric meets a certain condition.

Prerequisites

- You must create the metric-to-metric-type trigger first.
- If you wish to trigger an mail blitz to a list of prospects, then you must create that list first.
- The metric you wish to use as the basis for the condition must be associated with the campaign first.

Steps

1. Navigate to the Campaign Details - Trigger subtab:
   - If you are in the process of creating a new trigger, then this subtab appears automatically when you click Setup.
   - If you are editing a trigger, then drill down on the trigger name in the list that appears when you open the Trigger attribute.

2. If you wish to use a different time zone for the trigger, then, in the Monitor region, make a selection from the Time Zone drop-down list.
3. In the Start Date field, enter the date you wish the trigger to start monitoring.
4. Enter a time to start monitoring to the right of the Start Date. Use the 12-hour format (HH:MI PM).
5. If you wish to stop monitoring, then
   a. In the End Date field, enter the date you wish the trigger to stop monitoring.
   b. Enter a time to stop monitoring to the right of the End Date. Use the 12-hour format (HH:MI PM).
6. Enter information on how frequently and when the condition is to be monitored by the concurrent program:
   a. Enter a number in the Frequency field.
   b. From the drop-down list, select the time period. Daily or weekly, for example.
   c. In Daily Start Time and Daily End Time, enter the times when you wish to program to run.
7. In the Condition region, use the Metric Name drop-down list to select the metric you wish to use for the comparison. The metric must be associated with your campaign using the Metrics attribute for it to appear in this list.
8. Using the Metric Type drop-down list, select whether you wish to compare the actual, committed, or forecast value. The actual value is the value the metric has at the time the comparison is made.
9. From the Is drop-down list, select the operator for the comparison. For example, < for less than, or = for equal to.
10. Enter information about what you are comparing the metric to:
    a. Use the Object Type drop-down list to select the type of object that contains the metric you are comparing to. This can be any object with the Metric check-list attribute, including a campaign and event. Selecting an object type restricts the list of values you use in the next step.
    b. In Object Name click **Go** and use the list of values (LOV) to select the object with the metric you wish to compare. The selection you make here determines what metric you can choose in the next step.

c. Use the Metric drop-down list to select the metric for the comparison. Only the metrics associated with the object you selected in the previous step appear in this list.

d. Using the Metric Type drop-down list, select whether you wish to compare the actual, committed, or forecast value. The actual value is the value the metric has at the time the comparison is made.

11. In the Action region, select the **Send Notification to Owner** check box if you wish to send a reminder to the owner of the campaign on the date you entered. The notification is sent to the Notifications section of the Personal Home Page.

12. If you wish to trigger an email to be sent to a list you have created, then:

    a. Select the **Generate List** check box.

    b. Enter the list name using the drop-down list to the right.

    c. If you wish to schedule the email blitz for immediate execution, then check the appropriate radio button.

    d. If you must obtain approval first then select the Execute After Approval radio button, click **Go** and use the list of value to enter the name of the person who is to approve the email blitz.

13. Do not make entries in the Mail Preference region. You can enter all of the information in the schedule created automatically by this trigger.

14. Click **Update**.

The trigger checks for the condition at the times you specified in Monitor Setup. If the condition is met, the trigger creates a schedule and executes the blitz or waits for approval, if you had selected that condition.

References

Click here to see an example of how you can trigger an email blitz based on the response rate of another email blitz.

Entering Metric to Value Trigger Details

Use this procedure to enter the details for a metric to value trigger.

Prerequisites

- You must create the metric-to-value-type trigger first.

- If you wish to trigger an mail blitz to a list of prospects, then you must create a list of type template first.
- The metric you wish to use as the basis for the condition must be associated with the campaign first.

Steps

1. Navigate to the Campaign Details - Trigger subtab:
   - If you are in the process of creating a new trigger, then this subtab appears automatically when you click Setup.
   - If you are editing a trigger, then drill down on the trigger name in the list that appears when you open the Trigger attribute.
2. If you wish to use a different time zone for the trigger, then, in the Monitor region, make a selection from the Time Zone drop-down list.
3. In the Start Date field, enter the date you wish the trigger to start monitoring.
4. Enter a time to start monitoring to the right of the Start Date. Use the 12-hour format (HH:MI PM).
5. If you wish to stop monitoring, then
   a. In the End Date field, enter the date you wish the trigger to stop monitoring.
   b. Enter a time to stop monitoring to the right of the End Date. Use the 12-hour format (HH:MI PM).
6. Enter information on how frequently and when the condition is to be monitored by the concurrent program:
   a. Enter a number in the Frequency field.
   b. From the drop-down list, select the time period. Daily or weekly, for example.
   c. In Daily Start Time and Daily End Time, enter the times when you wish to program to run.
7. In the Condition region, use the Metric Name drop-down list to select the metric you wish to use for the comparison. The metric must be associated with your campaign using the Metrics attribute for it to appear in this list.
8. From the Is drop-down list, select the operator for the comparison. For example, < for less than, or = for equal to.

9. In the text box to the right of the operator, enter the value.
10. In the Action region, select the **Send Notification to Owner** check box if you wish to send a reminder to the owner of the campaign on the date you entered. The notification is sent to the Notifications section of the Personal Home Page.
11. If you wish to trigger an email to be sent to a list you have created, then:
    a. Select the **Generate List** check box.
    b. Enter the list of type Template name using the drop-down list to the right.
    c. If you wish to schedule the email blitz for immediate execution, then check the appropriate radio button.
    d. If you must obtain approval first then select the Execute After Approval radio button, click **Go** and use the list of value to enter the name of the person who is to approve the email blitz.
12. Click **Update**.

The trigger checks for the condition at the times you specified in Monitor Setup. If the condition is met, the trigger creates a schedule and executes the blitz or waits for approval, if you had selected that condition.

Entering Metric to Workbook Trigger Details

Use this procedure to enter the details for a metric to value trigger.

Prerequisites

- You must create the metric-to-workbook-type trigger first.
- If you wish to trigger an mail blitz to a list of prospects, then you must create a list of type template first.
- The metric you wish to use as the basis for the condition must be associated with the campaign first.

Steps

1. Navigate to the Campaign Details - Trigger subtab:
    - If you are in the process of creating a new trigger, then this subtab appears automatically when you click Setup.
    - If you are editing a trigger, then drill down on the trigger name in the list that appears when you open the Trigger attribute.

2. If you wish to use a different time zone for the trigger, then, in the Monitor region, make a selection from the Time Zone drop-down list.
3. In the Start Date field, enter the date you wish the trigger to start monitoring.
4. Enter a time to start monitoring to the right of the Start Date. Use the 12-hour format (HH:MI PM).
5. If you wish to stop monitoring, then
    a. In the End Date field, enter the date you wish the trigger to stop monitoring.
    b. Enter a time to stop monitoring to the right of the End Date. Use the 12-hour format (HH:MI PM).
6. Enter information on how frequently and when the condition is to be monitored by the concurrent program:
    a. Enter a number in the Frequency field.
    b. From the drop-down list, select the time period. Daily or weekly, for example.
    c. In Daily Start Time and Daily End Time, enter the times when you wish to program to run.
7. In the Condition region, use the Metric Name drop-down list to select the metric you wish to use for the comparison. The metric must be associated with your campaign using the Metrics attribute for it to appear in this list.
8. From the Is drop-down list, select the operator for the comparison. For example, < for less than, or = for equal to.
9. Using the Workbook field to the right of the operator, select the workbook you are comparing the metric to.
10. In the Action region, select the **Send Notification to Owner** check box if you wish to send a reminder to the owner of the campaign on the date you entered. The notification is sent to the Notifications section of the Personal Home Page.
11. If you wish to trigger an email to be sent to a list you have created, then:
    a. Select the **Generate List** check box.
    b. Enter the list of type Template name using the drop-down list to the right.
    c. If you wish to schedule the email blitz for immediate execution, then check the appropriate radio button.

   d. If you must obtain approval first then select the Execute After Approval radio button, click **Go** and use the list of value to enter the name of the person who is to approve the email blitz.

12. Click **Update**.

The trigger checks for the condition at the times you specified in Monitor Setup. If the condition is met, the trigger creates a schedule and executes the blitz or waits for approval, if you had selected that condition.

Handling Responses to a Campaign or Event

Use this procedure to set up response handling for an execution campaign or an execution event using the Response check-list attribute.

Prerequisites

None

Steps

1. Navigate to the Response check-list attribute.
2. If prospects will reply to the campaign or event over the phone, then:
   a. Use the Script list of values (LOV) to select the appropriate script telemarketers will use to talk to the prospects.

   Note: You can only attach a script that has been created first using Oracle Scripting. You cannot create a script within Oracle Marketing Online.

   b. Enter the phone number the prospects are to call in the Phone field.
3. If prospects are replying by email, then enter the email address.
4. If prospects are to reply on a web site, then enter the URL.
5. Click **Update**.

Entering Information About Partners

Use this procedure to enter a list of partners using the Partner check-list attribute.

Prerequisites

None

Steps

1. Navigate to the Campaign Details subtab.
2. Click on the Partner check-list attribute.

   The Campaign Details - Partner subtab appears.
3. In Name, click **GO** and use the list of values to enter a partner name.
4. Click **Update**.
5. Repeat this procedure to add additional partners.

Getting Approval for Your Campaign Theme

Use this procedure to obtain approval from your supervisor for a campaign you have created.

Prerequisites

- You must create a campaign first.
- The application administrators must enable the approval work flows when they set up the campaign type.

Steps

1. Navigate to the Campaign Details subtab of the campaign that needs to be approved.
2. From the Status drop-down list, select Planned.

The status becomes "Pending Theme Approval" and the application sends a message with your request and basic campaign information to your supervisor.

You receive a notification in your Personal Home Page after your supervisor approves or rejects your campaign theme. If the campaign theme has been rejected, the status becomes "Denied Theme Approval". If it has been approved, the status becomes "Planned."

See Also

How campaigns are approved

Getting Approval for Your Campaign Budget

Use this procedure to obtain approval for your campaign budget.

Prerequisites

- You must obtain a campaign theme approval before requesting a budget approval.
- The application administrators must enable the approval work flows when they set up the campaign type.

Steps

1. Navigate to the Campaign Details subtab of the campaign that needs to be approved.
2. Make sure you enter the budget source and budget amount you are requesting.
3. From the Status drop-down list, select Active.

The Status changes to "Pending Budget Approval" and the application sends a message with your request and basic campaign information to the owner of the budget you are requesting.

You receive a notification in your Personal Home Page after the budget owner approves or rejects the budget. If the budget has been rejected, then the status becomes "Denied Budget Approval". If it has been approved, the status becomes "Active."

See Also

How campaigns are approved

Copying a Campaign

Use this procedure to copy an existing rollup or execution campaign.

Prerequisites

The campaign must be listed under My Campaigns indicating you have permission to copy it.

Steps

1. Navigate to the **Campaign** tab.

2. Select the hyperlink for the campaign to be copied.

   The Campaign Details subtab appears.

3. Click **Copy**.

   The Copy Campaign window appears.

4. Make sure that the campaign you wish to copy appears in the Source Campaign field. If it does not, then select it using the list of values (LOV).

5. Enter the name for the new campaign.

6. Do not enter a Source Code. This field will be populated by the application automatically.

7. Enter the date the new campaign is to become effective.

8. In the Select Attributes for Copying region, select the check boxes of the attributes you wish to copy to the new campaign. Only the attributes that are populated with data appear on this list.

9. Click **Copy Now**.

   The new campaign is created.

10. Navigate back to the main Campaign tab by clicking on it.

11. Drill down on the hyperlink of the new campaign you have created.

12. Attach the campaign to a new place in the campaign hierarchy by making an entry in the Parent field.

13. Edit the details for the new campaign.

Using the Deliverables Tab

Use the Deliverable tab to store and track the electronic files for your creative projects and campaigns. You can also use it to keep track of physical collateral in your inventory.

You can obtain help on how to:

- View and edit a deliverable
- Create a deliverable
- Create a kit of deliverables

Viewing and Editing a Deliverable

Use this procedure to view and edit an existing deliverable.

Prerequisites

None

Steps

1. Navigate to the Deliverable tab.
2. If you do not see the deliverable you wish to view or edit among those displayed in the list, then search for it by changing the View, or using QuickFind and Advanced Search.
3. Click on the hyperlink of the deliverable you wish to view or edit.

The Deliverable Details subtab displays. You are now ready to edit the deliverable information.

Creating Deliverables

Use this procedure to create deliverables that you can associate with campaigns or events.

Prerequisites

None

Steps

1. Navigate to the Deliverable tab.
2. Click **Create**.

   The Create Deliverable subtab appears.
3. Enter a unique name.
4. Enter a version for the deliverable. Usually this number will be 1 because you are creating a new deliverable.

> **Note:** Oracle Marketing Online does not support versioning. If you enter a new version of a deliverable in the future, it will overwrite the previous version.

5. Select a status.
6. In Available From and Available To fields, enter the dates this deliverable will be available for editing and use.
7. In Due Date, enter the deadline for this deliverable. The deadline must fall on or before the Available From date.
8. If you do not wish others in your organization to view or edit this deliverable, select the **Private** check box.
9. Select a language if other than American English.
10. Classify the deliverable using the Type and Subtype drop-down lists.
11. If you wish the owner to be someone other than yourself, use the Owner list of values (LOV) to select a different person.
12. In Budget Amount, enter the currency and the budget for this deliverable.
13. Enter a description.
14. Click **Create**.

You are now ready to enter the detailed information about the deliverable, this includes storing of associated electronic files as attachments.

Entering or Editing Detailed Deliverable Information

Use this procedure to enter or edit information about a deliverable.

Note: You can edit all fields of deliverables except for the Due Date. This can only be changed by an administrator.

Prerequisites

You must create the deliverable first.

Steps

1. Navigate to the Deliverable tab.
2. If you do not see the deliverable you wish to view or edit among those displayed in the list, then search for it by changing the View, or using QuickFind and Advanced Search.
3. Click the deliverable hyperlink.

The Deliverable Details subtab appears.

4. If you are creating a new version of a deliverable, then enter a new version number.
5. Edit fields as desired.

> **Note:** Oracle Marketing Online does not support automatic versioning. If you are entering a new version of a deliverable, it will overwrite the previous version.

6. If you are creating a deliverable that includes electronic files, then attach those files by clicking the Attachment check-list attribute and following the instructions for creating an attachment.
7. Fill in information in the other check-list attributes on the left side of the screen. You can learn about each attribute by following the appropriate link in the Guidelines section.

Guidelines

The list below includes all check-list attributes used for rollup events.

Only a subset of these attributes may be listed in the check list for your event. This is because different types of events track different types of information.

- Budgets: This is where you request funds for the deliverable.
- Inventory and Kit: Use this attribute to create a kit and enter it into inventory.
- Attachments
- Costs
- Metrics
- Notes
- Tasks

Creating a Kit of Deliverables

Use this procedure to compile a number of deliverables into a kit. The kit itself must be created as a deliverable first before you can add deliverables to it.

Prerequisites

You must create the kit as a new deliverable first.

Steps

1. Navigate to the Inventory and Kit check-list attribute for the deliverable you have created for the kit. This attribute appears among the check-list attributes in the Deliverable Details subtab.
2. If the kit is made up of electronic files, then select the Managed Electronically radio button.
3. If the kit is made up of physical collateral, then:
   a. Select the Managed Physically radio button.
   b. If you are keeping the kits as part of inventory, then select the Stock Manually radio button and enter the quantity you have in the Quantity field.
   c. If the kit is to become an inventory item, then enter an inventory part number in the Part Number field.
4. In the Kit region, enter the deliverables that are a part of this kit:
   a. Using the Name list of values, enter the name of the deliverable.
   b. Click **Update**.
   c. Repeat this procedure for each deliverable in the kit.
5. Click **Update**.

Using the Event Tab

Use the Event tab to manage marketing events.

You can obtain help on how to:

- View and edit a rollup event
- View and edit an execution event
- Create a rollup event
- Create an execution event

You can obtain more information about events in:

- Understanding events

Viewing and Editing a Rollup Event

Use this procedure to view and edit an existing rollup event.

Prerequisites

None

Steps

1. Navigate to the Event tab.
2. If you do not see the event you wish to view or edit among those displayed in the list, then search for it by changing the View, or using QuickFind and Advanced Search.
3. Click on the hyperlink of the event you wish to view or edit.

The Event Details subtab displays. You are now ready to edit the rollup event information.

Viewing and Editing an Execution Event

Use this procedure to view and edit an existing execution event.

Prerequisites

None

Steps

1. Navigate to the **Event > Execution Event** subtab.
2. If you do not see the execution event you wish to view or edit among those displayed in the list, then search for it by changing the View, or using QuickFind and Advanced Search.
3. Click on the hyperlink of the execution event you wish to view or edit.

The Event Details subtab displays. You are now ready to edit the execution event information.

Creating a Rollup Event

Use this procedure to create a rollup event. A rollup event holds the general description of an event and provides the structure for reporting costs and dispersing budgets to individual sessions of the event. If your company is planning to train the sales force in different cities on your new product line, for example, then the rollup event holds information about the course content and the budgets for the individual sessions to be held in the different cities.

Prerequisites

None.

Steps

1. Navigate to the Events tab.
2. Click on the Events subtab.
3. Click **Create**.

   The Create Event subtab appears.
4. Use the Setup Type drop-down list to select the type of event you wish to create. Selecting a type determines which information you are required to enter. These types are set up by your administrator.
5. Leave the Source Code field blank. It gets filled automatically with a unique code after your event gets created.
6. Enter a name for the event according to naming conventions for your organization.
7. Enter the start date and end date you wish this event to be available for use.
8. Optionally, enter the duration of the event.
9. If you are not the person who is approving budgets or other activities for this event, then you must enter that person in the Owner field.
10. Enter a description of the event.
11. Click **Create**.

    The Rollup Event Details window appears. You are now ready to enter details for this rollup event.

Entering or Editing Information for a Rollup Event

Use this procedure to add or to edit details for a rollup event you have created.

Prerequisites

You must create a rollup event before entering its details.

Steps

1. Navigate to the Rollup Event Details window.
2. Enter the budget source and budget amount. The entry you make in this field determines how the budget for this event is rolled up passed on for approvals. Usually, the budget for the event comes from a rollup campaign.
3. Select applicable check boxes:
   - **Confidential**: The information is not released on any web site or telemarketing application.
   - **Invite Only**
   - **Registration Required**
   - **Payment Required**
4. Fill in information in the different check-list items, called attributes, on the left side of the screen. You can learn about each attribute by following the appropriate link in the Guidelines section.

Guidelines

The list below includes all check-list attributes used for rollup events.

Only a subset of these attributes may be listed in the check list for your event. This is because different types of events track different types of information.

- Attachments
- Campaign
- Costs
- Deliverable
- Event Agenda
- Execution Event
- Market
- Message
- Metrics

- Notes
- Partner
- Products
- Resource
- Response
- Tasks
- Team

Promoting an Event by Associating It with a Campaign

You can promote an event by creating a campaign for it and associating the event with that campaign. Use this procedure to associate the event with a campaign you have created.

Prerequisites

You must create the campaign before you can associate it with an event.

Steps

1. In the Rollup Event Details subtab, click on the Campaign attribute.

   The Rollup Event Details - Campaigns subtab opens.

2. Use the Campaign Name list of values (LOV) to enter the campaign you wish to associate with the event.

3. Click **Update** to save your work.

Entering an Event Agenda

Use this procedure to enter the agenda for a rollup or execution event. If your event has multiple activities happening at the same time, you can split up your event into separate tracks.

If you create an agenda for a rollup event, then that agenda is automatically copied to the execution events you link to that rollup event. You can then modify each execution event agenda to add details pertinent to the specific execution event. If you choose to create an agenda for an execution event, then that agenda is valid only for that execution event.

Prerequisites

You must create a rollup event or a an execution event before you can enter its agenda.

Steps

1. For each item on the agenda for your event:

   a. If your event takes place over a number of days, then select the day of the event.

   b. In the Name field, enter the name of the activity.

   c. If the activity is happening at the same time as another activity, then select a track for it that is different from the existing activity.

   d. Enter a start time and end time for the activity. Times must be in the 12-hour format (HH:MI PM).

2. Click **Update**.

3. In the Details column, click the Setup hyperlink to the right of each agenda item you have created and enter any speaker information and notes you may have for the item.

Entering Speakers and Other Details for an Event

Use this procedure to enter the speaker and other details for an agenda item in your event.

Prerequisites

You must set up the agenda for an event before you can enter details.

Steps

1. Navigate to the Rollup Event Details - Agenda Details window.

2. If the agenda has a coordinator, then enter it in the Coordinator field.

3. If you have a speaker for this agenda item, then click **Go** next to the Name field and use the list of values (LOV) to enter the speaker's name.

4. From the Status drop-down list, select the confirmation status for the speaker.

5. Enter any optional comment in the comment field.

6. If you wish to enter a note, then:

a. Using the drop-down list, select the note type.

b. Enter the note.

c. Click **Update**.

Entering Event Venues, Coordinators, and Other Resources

Use this procedure to enter venues, coordinators and other resources for your event.

Prerequisites

You must set up venues before you can associate them with an event.

Steps

1. Navigate to the Rollup Event Details - Agenda Details window.
2. Using the Type drop-down list, select the type of resource you wish to associate with the event.
3. If the resource you are assigning to this event is a person, then enter the person's name and role.
4. Select a status from the Status drop-down list.
5. Click **Update**.

Creating an Execution Event

Use this procedure to create an execution event. An execution event allows you to create specific sessions of events and to track participation and enrollment in each.

Prerequisites

You must create rollup event before you can use this procedure.

Steps

1. Navigate to the Create Execution Event subtab, **Event >Execution Event**. While creating a rollup event you can navigate here from the Rollup Event Details window by clicking the Execution Event attribute hyperlink.
2. In Event Name, enter the name of the rollup event you are associating this event with.
3. In the Execution Event Name field, enter the name of the event.

4. Select the type of event.
5. If the person responsible for this event is other than yourself, enter that person's name in the Owner field.
6. From the Setup Type drop-down list, select the custom setup for the event. The custom setup is created by the application administrator and determines the type of information you can track with an execution event.
7. Make entries in other optional fields.
8. Click **Create**.

   The Execution Event Details window appears. You are now ready to enter detailed information for the event you have created.

Entering Details for an Execution Event

Use this procedure to enter or modify details about an execution event you have created.

Prerequisites

You must first:

- Create rollup event
- Create an execution event
- Create a venue for the execution event

Steps

1. Navigate to the Execution Event Details subtab. This subtab appears automatically when you create a new execution event. You can also reach it by the following method:
   a. Navigate to Event > Execution Event
   b. Select the hyperlink for the execution event you wish to modify.
   c. Select the General check-list attribute.
2. Enter the budget source for this event:
   a. Use the Budget Source drop-down list to select the budget type. If the budget comes from the rollup event, then select rollup event.

   b. Use the Budget Source list of values (LOV) to select the rollup event or other budget source.

3. The Source Code field is automatically populated with the unique identifying code generated by the application for this execution event. Do not modify it unless you are instructed otherwise by your application administrator.
4. Enter the start and end dates when this event will be available for use.
5. Enter the duration of the event.
6. In Facility, use the LOV to enter the venue where the event is to be held.
7. Make entries in other optional fields, as desired.
8. Select applicable check boxes:
   - Confidential: the information is not released on any web site or telemarketing application.
   - Invite Only:
   - Registration Required:
   - Payment Required:
9. Click **Update**.
10. Fill in information in the different check-list items, called attributes, listed on the left side of the screen. In the list below, click on a hyperlink corresponding the attribute you wish to learn more about.

Guidelines:

The list below includes all check-list attributes used for rollup events.

Only a subset of these attributes will be listed in the check list for your event. This is because different types of events need to track different types of information.

- Attachments
- Campaign
- Costs
- Deliverable
- Event Agenda
- Invite List
- Market

- Message
- Metrics
- Notes
- Partner
- Products
- Publishable Notes
- Registration
- Resource
- Response
- Tasks
- Team

Setting Up Event Registration

Use this procedure to specify registration details for an execution event. This includes determining enrollment numbers and pricing.

Prerequisites

You must create an execution event first.

Steps

1. Navigate to the Execution Event Details subtab and select the Registration hyperlink.

   The Execution Event Registration Setup window appears.

2. In the Maximum Size field, enter the maximum number of registrants.

3. If you wish to limit registration to the number of registrants you entered in the Maximum Size field, then select the **No Overbooking** radio button.

4. If you wish to allow people to continue to register for the event regardless of the number you entered in the Maximum Size field, then select the **Allow Overflow** radio button.

5. If you wish Oracle Marketing Online to automatically create a new session of your execution event after the number of registrants has passed the number you have entered in the Maximum Size field, then:
   a. Select the **Overbook by** radio button.
6. Enter the percentage of overbooking to trigger the new session. For example, if the maximum number of registrants is 100 and you enter 10% then the application will allow up to 110 people to attend your original event. The 111th person is automatically enrolled in a new session as are all the subsequent enrollees. If you wish to continue to allow registrant application even when registration is full, then:
   a. Select the **Waitlist Enabled** check box.
   b. Specify the allowed size of the waitlist by entering a percentage value in the Waitlist field.
   c. Select a waitlist rule. The default is First Come First Serve: the first person on the waiting list gets the first available place.
7. Enter the minimum size for this event. This number can be used to trigger a cancellation of the event or further campaign activity if you do not meet the minimum enrollment by the date you enter in the Attain Minimum By field.
8. In Attain Minimum By field, enter a date by which the event must reach a minimum enrollment.
9. Select the enrollment start day and time.
10. Enter the enrollment end day and time.
11. Specify the time zone to further clarify the dates and times.
12. If you are charging for the event, then enter the cost and payment details. This information will be added to your inventory:
    a. If the attendee cost is based on a price list, select the applicable price list.
    b. If you wish to enter an event price, then enter an amount and the applicable currency.
    c. For a non-cash payment, select the credit type that is accepted for payment. Enter any credits that are accepted.
    d. Enter the number that will be the inventory number for this event.
13. If your organization uses a credit system such as that used at colleges and universities for classes, then:

   a. From the Credit Type drop-down list, select the type of credits used.
   b. Enter the number of credits for this event.

14. If you wish to view the status of registration, then click the View List hyperlink.
15. Click **Update** to save these details.

Viewing the Status of Registration for an Event

Use this procedure to view the status of a registration for an event.

Prerequisites

Registration for your event must be handled by a related application such as Oracle TeleSales or imported into Oracle Marketing Online.

Steps

1. Navigate to the Execution Event Details subtab and select the Registration hyperlink.

   The Execution Event Registration Setup window appears.

2. Click the View List hyperlink at the bottom of the window.

   Execution Event Details - Registration List subtab appears displaying the registrants for your event and their status.

Publishing Event Notes on Your Web Site

Use this procedure to publish notes about an execution event on your company's web site. You cannot use Oracle Marketing Online to specify the presentation of the information you wish to publish. You can only use it to enter the text.

Prerequisites

Your application must be configured to work with your web site via a product such as Oracle iStore.

Steps

1. Navigate to the Execution Event Details subtab and select the Publishable Notes hyperlink.

   The Execution Event Details - Notes subtab appears.

2. If you wish to view an existing note, then click on the note hyperlink at the bottom of the window under the Note History heading.
3. If you wish to enter a note to be published, then:
   a. Select an optional Note Type.
   b. Enter the note.
   c. Click **Update**.

Specifying the Invitation List for an Execution Event

Use this procedure to specify the list of people you wish to invite to your execution event.

Prerequisites

You must create the list of invitees first before you can attach it to the execution event.

Steps

1. Navigate to the Execution Event Details subtab and select the Invite List hyperlink.

   The Execution Event Details - Invitation List subtab appears.
2. Use the List Name list of values (LOV) to enter the list name.
3. Click **Update**.

Using the Budget Tab

Use the budget tab to set up budgets that are used to pay for campaigns, offers, events, and deliverables. If you wish to draw funds from an existing budget, then use the Budget check-list attribute in campaign, event, or deliverable instead.

You can obtain help on how to:

- Create a budget
- Edit budget information
- Allocate budgets
- Check how budgets are spent

- Request the transfer of funds from one budget to another

For more information on budgets see:

- Understanding Budgets

Creating a Budget

Use this procedure to create a budget.

Prerequisites

None

Steps

1. Navigate to the Budget tab
2. Click **Create**.

   The Create Budget subtab appears.
3. Enter the budget name.
4. In Number, enter a unique identification number.
5. If this budget is subordinate to another budget, then click **Go** in the Parent field and use the list of values to enter the parent budget.
6. In Budget Amount, enter an amount. You entry must be a whole number. No spaces, commas or decimal points are allowed.
7. If the budget is in a currency other than the one shown in the Currency field, then select that currency from the drop-down list.
8. In Holdback Amount, enter the amount you wish to use as a reserve.
9. From the Category drop-down list, select a budget category.
10. Use the Department drop-down list to select your department.
11. If you are not the owner of this budget, then, in Owner, click **Go** and use the list of values to select a different owner.
12. Leave Status as Draft. The status will be updated automatically when you create the budget.
13. Enter the dates the budget is to remain active.

14. Unless you are working in N-tier marketing, do not make entries in the General Ledger and Accrual Parameters.
15. Click **Create** to create the budget.
16. The Budget Details subtab appears. You are now ready to enter details about your budget.

Entering or Editing Budget Information

Use this procedure to edit or enter budget information for a budget you have created.

Prerequisites

None

Steps

1. Navigate to the Budget tab. If you have just created a budget, then this subtab opens automatically, otherwise you can navigate to it by clicking on the name of the budget you wish to edit in the Budget tab.
2. Fill in information in the different check-list items, called attributes, listed on the left side of the screen. In the guidelines below, click on a hyperlink corresponding the attribute you wish to learn more about.
3. You can edit information in all the fields in this subtab. These are the same fields you filled out when you created the budget. The guidelines section describes the fields.
4. Click **Update**.

Guidelines:

The list below includes all check-list attributes used for budgets.

- Allocation
- Checkbook
- Market
- Notes
- Products
- Team

Here are the fields you can edit:

Field	Description
Name	Unique budget name.
Parent Name	Name of a budget this budget is derived from. Make an entry here if you are creating a budget hierarchy.
Budget Amount	The currency amount of your budget. You entry must be a whole number. No spaces, commas or decimal points are allowed.
Holdback Amount	The amount you wish to use as a reserve.
Category	Budget category. Categories are determined by your implementation team.
Department	Your department.
Owner	The person who owns the budget approves any charges against that budget.
Active From /Active To	Budget effective dates.
Status	Triggers Workflow approval. Changing the status to Active requests approval from your manager.
Expense Account	Reserved for N-tier marketing.
Accrual Account	Reserved for N-tier marketing.
Basis	Reserved for N-tier marketing.
Accrual Cap	Reserved for N-tier marketing.
Rate	Reserved for N-tier marketing.

Allocating Budgets

This check-list attribute is for use by N-tier marketing customers only to allocate budgets according to sales territory.

No help is available for this feature at this time.

Checking How A Budget is Spent

Use this procedure to see how much money is left in a budget and how the money has been spent.

Prerequisites

None

Steps

1. Navigate to the Checkbook check-list attribute:
    a. If you have just created a budget, then the Budget Detail subtab opens automatically, otherwise you can navigate to it by clicking on the name of the budget you wish to edit in the Budget tab.
    b. Click the Checkbook check-list attribute.
2. If you wish to view further details on the total, planned, committed, earned, or paid amounts, you can do so by clicking on the currency amounts in those lines. Each of these currency amounts is hyperlinked to a report which appears in a separate subtab.

Requesting Transfer of Funds from One Budget to Another

Budget creators can use this procedure to request the transfer funds from one budget to another.

Prerequisites

You must have permission to create budgets. Both budgets must have the status of active for you to be able to transfer funds between them. If a budget has the status of new, then you can edit the budget amount directly without asking for a transfer.

Steps

1. Navigate to the **Budget > Budget Transfer**.
2. The Budget Transfer subtab appears.
3. Click **Go** in the Name field and use the list of values (LOV) to enter the budget you are transferring funds from.

    The owner and remaining funds appear for the budget you selected.
4. In Requested Amount, enter the amount of the budget you wish to transfer.
5. In Transfer To, click **Go** and use the LOV to enter the budget you wish to transfer funds to.
6. Click **Transfer**.

7. If you are the owner of both budgets, then the budget amount is transferred automatically:
   a. The Budget Transfer confirmation subtab appears.
   b. Click **OK**.
8. If you are not the owner of the budget, then your request is submitted to the budget owner and your supervisor for approval. The amount if transferred on their approval.

Guidelines

Understanding Budgets

Using the Audience Tab

Use this tab to create and manage lists.

You can obtain help on how to:

- View a List
- Create a list
- Import a list
- Create and edit target and market segments
- Create a list import mapping template

For an understanding of the audience tab and how it interacts with Oracle Web Discoverer see:

- About List Types and Templates
- About Creating Lists
- About Workbooks, Worksheets, and Oracle Web Discoverer

Viewing and Revising a List

Use this procedure to view and revise a list you have created.

Prerequisites

If you wish to view the list, it must be already generated.

Steps

1. Navigate to **Audience > Audience**.
2. Select the name hyperlink for the list you wish to view or edit.

   The List Details subtab appears.
3. If you wish to view the list that has been generated, then click the View List Entries hyperlink. You can only view a list with a status of Active. This indicates that the list has been generated.
4. If you wish to edit any of the criteria used to generate the list, refer to the procedure found in Creating a List.

Creating a List

Use this procedure to create a list of targets for your campaigns and lists of invitees for your events. Depending on your installation, you can use lists for email campaigns you set up in Oracle Marketing Online, for telemarketing execution through Oracle TeleSales, for direct mail campaigns through third-party mail-merge programs, for iMarketing execution over the Web, or for face to face sales through Oracle Sales Online.

You can create lists from queries that you have built in Oracle Web Discoverer or from other lists.

Prerequisites

The sources for your list must be created first. Sources include workbooks you create in Oracle Web Discoverer or other lists you have created in the past.

Steps

1. In the Audience tab, click **Create**.

   The Create List screen appears.
2. If are using Oracle Web Discoverer workbooks to create your list and you have not created them yet, you must do so now by clicking Web Discoverer and following the procedure outlined in Creating Workbooks in Web Discoverer.
3. Enter the list name.
4. From the Type drop-down list, select the type of list you are creating:

   a. If you are scheduling the list for immediate execution through a campaign schedule or an execution event, then select Target.

A target list queries the database and generates a fixed list of customers or prospects.

Use this list type to invite prospects and customers to an event by associating the list with an execution event or to execute mail blitzes and other marketing activities using the campaign schedule check-list attribute.

b. If you are creating a list for execution via a trigger or creating a list that you will reuse in the future, then select Template.

   Templates store both the current list of customers as well as the query criteria used to generate that list. Every time you copy or use the template, the query is run automatically and the list is refreshed from the database. This assures that you are using the most up-to-date list of customers and prospects.

5. From the Status drop-down list, select a status for the list. See guidelines below for more information about list status.
6. Use the Association Type drop-down list to specify whether this list is going to be associated with a campaign or an event.
7. Enter an optional description.
8. If you wish to create a list from a single workbook or target segment, then in the Selection Criteria region:
   a. Using the Type drop-down list, select whether you are using a workbook or a target segment.
   b. Use the Name list of values to enter the name of the workbook or target segment you wish to use.
9. If you wish to create the list from multiple workbooks, target segments, or lists, then, in the Selection Criteria region, enter each source element on a separate line:
   a. Using the Type drop-down list, select whether the source is a workbook or a target segment.
   b. Use the Name list of values to enter the name of the source.
   c. Using the Action drop-down list, indicate how you wish the entries in the source to be used in combination with the other lists. You must always assign Include as the Action for the first source.

      The available actions for the other sources are:

      * **Include**: Include all the customers or prospects in the list or workbook.

* **Exclude:** Exclude all the customers or prospects in the list or workbook.
* **Intersect:** Use the intersection of two sources.

d. If you are using more than two sources, then use the Order fields to specify the order in which the application is to process the sources. The order you assign determines the outcome of the list generation process.

10. In Size Selection, enter information about the maximum size of the list you wish to generate either as an absolute number or as a percentage. Enter one of the two following:

    - In the Maximum field, enter the maximum number of records for your list. List generation will stop after this number is reached.
    - In the Percent of Rows field, enter a value for the percentage of candidates to be picked from among all those eligible.

11. If you entered the maximum list size as a percentage in the previous step, then enter a weigh in the % field for each list source you added.

    If you specify the first source to have a weight of 90%, for example, then 90% of the selections will be performed from that list. The percentages for your sources must add up to 100.

12. If you have entered a maximum size for your list, then, in the Selection Size region, select one of the radio buttons corresponding to your desired selection method:

    - **Top Down**: Starts picking from the top of the list until the maximum size is reached.
    - **Every Nth Row**. Picks every Nth row, depending on the number you enter.
    - **Random**: Selects entries at random.

13. If you wish to have reports generated on list use, then, in the List Details region, select the **Log Reports** check box.

14. If you wish to remove duplicates at the time the list is generated, then, in the List Details region:

    a. Select the **Remove Duplicates on Generated List** check box.

    b. Select the rule used for the removal by clicking **Go** in the Rule field and using the list of values.

    c. For each source you have added in the Selection Criteria region, enter a ranking in the Rank field. The rank you assign determines which source will win in case there is a duplicate. The higher ranked source is the one that supplies the entry into your list.

15. If you wish the duplicate removal process to use a list of words commonly used as duplicates, then select the **Use Word Replacement** check box. For example, a word replacement rule can instruct the application to treat Bill as a duplicate of William for first names. The word replacement rules are set up by your application administration team.
16. If you are creating a list of Type Target, then, in the List Generation Region:
    a. Select the **Generate List** check box.
    b. If you with to generate this list immediately, then leave the Scheduled Date and Time Zone and Time fields blank. Otherwise fill in the desired day and time you wish the list to be generated.
17. Click **Update** to save the list details.

    The List subtab appears.

    If you have selected the **Generate List** check box and scheduled the list for immediate execution, then the list Status changes to Available when the list is generated.

Guidelines

The table below explains the different statuses for lists.

Field	Explanation	
Status	List status can be set by the user and the application. Here are the values:	
	New	Default status when you create a new list.
	Locked	The list is being used by a campaign. You cannot make any modifications.
	Expired	List is not available for use. Your license has expired or the list is out of date, for example.
	Archived	List is not available for use.

References

- About List Types and Templates
- About Creating Lists
- About Workbooks, Worksheets, and Oracle Web Discoverer

Creating a List Import Mapping Template

Use this procedure to create an import mapping template. The template maps the fields of a list you wish to import. You must create this template before importing the list.

Prerequisites

None

Steps

1. Navigate to **Audience > Import**
2. Click **Create**.

   The Import Mapping Template subtab appears.

   If your list has a header row, then the Source Field displays the field name, otherwise this column displays the first record in the file.
3. Enter a template name.
4. Enter a code.
5. Leave the default destination column fields unless the destination fields cannot accommodate the size of the source field. You can view the field sizes in the Oracle Marketing Online Technical Reference Manual.
6. Optionally, update the Source Field Meaning. If the list has no header and you specified this during list creation, then the application uses a generic column reference, for example: COL1, COL2, and so on.
7. If you like to exclude any of the fields from the imported list, then unselect the **Include** check box next to that field.
8. Save your work by clicking **Create**.

Viewing Existing Workbooks

Use this procedure to view existing workbooks in Oracle Web Discoverer.

Prerequisites

None

Steps

1. In the Audience tab, click on an existing list name or click **Create**.

   The Create List or List Details subtab appears.

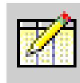
2. Click the Web Discoverer hyperlink at the top right hand corner of the window.

   After the Oracle Web Discoverer applet finishes loading, Step 1 of the Workbook Wizard appears.

3. Click **Open an existing workbook**.
4. The question "Where is the workbook you want to open?" appears.
5. Click **Database**. You can only access workbooks stored in the database.
6. Oracle Web Discoverer displays list of existing workbooks.
7. Select a workbook you wish to view.
8. Click **Open**.

   Oracle Web Discoverer automatically executes the workbook query and displays the results.

9. If you wish to view and edit the query, then click the Edit button on the toolbar.



Oracle Web Discoverer displays the query.

10. You can modify the workbook or worksheet using the same procedure outlined in Creating WorkBooks in Discoverer.

References

About List Types and Templates

About Creating Lists

About Workbooks, Worksheets, and Oracle Web Discoverer

Creating Workbooks in Oracle Web Discoverer

Oracle Web Discoverer allows you to create queries that you can use to generate lists in Oracle Marketing Online without the knowledge of programming or a query language. Use this procedure to create queries in Oracle Web Discoverer.

Prerequisites

None

Steps

1. In the Audience tab, click on an existing list name or click **Create**.

   The Create List subtab appears.

2. Click the Web Discoverer hyperlink at the top right hand corner of the window.

After the Oracle Web Discoverer applet finishes loading, Step 1 of the Workbook Wizard appears.

3. Click **Create a new workbook.**
4. Select the **Table** radio button
5. Click **Next** to move to Step 2 of the wizard.
6. The wizard now displays all the Oracle Marketing Online folders. These hold the fields you can use to construct your query.
7. To view the contents of a folder, click on the + node to the left of it.
8. Construct your query by moving whole folders or individual fields using the right arrow button:
   a. Select the folder or field.
   b. Click the right arrow button.

   When you select a folder other folders and fields become grayed out (disabled). This means that the criteria in the grayed-out folders and fields are already included in the folder you have selected.
9. In the query you construct, you must include at least one mandatory field: Mandatory Identifier. If you have not included it in your query, then you can add it from the All Contacts folder.

   Note: You must include at least this mandatory field for a query to work properly.

   ---
10. If you are adding folders with mandatory fields in the form AMS <folder name> Id, then you must add these as well.
11. If you are building a query to create an email blitz, then include the following mandatory identifiers (see Guidelines for an example):
    - Include Contact Details
    - Include Organizational Details
    - Include Email
12. If you plan to use a field for the condition of the query, then you must include that field in your query as well. For example, if you plan to restrict the query

using the condition `Organization Name = "Global Enterprises"`, then you must select the Organization Name field for your query.

13. Click **Finish**.

    Oracle Web Discoverer executes the query you just created and the results.

14. If you wish to add a condition to the query, then:

    a. Click the Edit button in the toolbar.

    b. Select the Condition tab.

    c. Click **New**.

       The New Condition window appears.

    d. In the Item field of the Formula region, select the item to be validated.

    e. Using the Condition drop-down list, select the operator.

    f. In the Values field, enter the value for the comparison.

    g. Click **OK**.

       The Conditions tab appears displaying the condition you have created.

    h. Click **OK**.

15. Click **Save** on the toolbar. This is the diskette icon.

Guidelines

Here is a sample query you can use to create a workbook for an email blitz:

Select the following folders and fields to create a workbook that will extract email addresses for a mailing list which will be used in an direct email campaign

From the All Contacts folder select the following:

- Mandatory Identifier
- Include Contact Details
- Include Organization Details
- Include Email
- Organization Id
- Party Id
- Contact name (This field is optional.)

- Contact phone (This field is optional.)

From the Contact Email folder, select the following fields:

- AMS Contact Email Id
- Contact Id
- Email Address

References

- About List Types and Templates
- About Creating Lists
- About Workbooks, Worksheets, and Oracle Web Discoverer

Importing a List

Use this procedure to import a list or modify an existing import.

Prerequisites

The list you are importing must be loaded as a text file in the directory specified by your application administrator using the system profile option AMS_IMP_CTL_PATH.

Steps

1. Navigate to **Audience > Import**
2. If you wish to create a new list, then click **Create**.

   The Import List subtab appears.
3. If you wish to modify an existing list import, then click on the name of the list you wish to edit.

   The Import Details subtab appears.
4. Enter in the import list name.
5. Select the import type as Rented List. Other types are for future releases.
6. Specify other details of the imported list such as the version number, the vendor that supplied the list, the cost of purchasing the list, the expiration date, and a description.

7. Enter the list import parameters:
   a. Enter the file name for the import file.
   b. Using the Mapping Template drop-down list, select an import mapping template you wish to use to map this file and indicate any number of rows to skip. If no mapping template exists, then click **Create New** to create it. (See Creating a List Import Mapping Template)
   c. Specify how the columns are delimited in the import file and what the fields are enclosed with.
   d. If a file header exists in the file, select the **File Header Exists** check box. The file header is the first row in the file which contains the field names of the imported file.
   e. If you wish to have duplicate entries removed from the list, then select the **De-Duplicate the Import** check list.
   f. Do not select Perform Post Import Processing. Post-import processing is not used in this release. All imported list entries are maintained separately from the parties (customer) tables.
8. Click **Create** to execute the import into the database
9. You must now generate the list before it can be used. You can do so by creating a Workbook within Oracle Web Discoverer.

Creating and Editing Target and Market Segments

Use this procedure to create target or market segments or edit existing ones. Target or market segments provide a way of organizing the queries you create in Oracle Web Discoverer.

A market segment could be defined as all individuals earning over a certain income level in a Australia, for example. A target segment could be only those individuals living in the cities of Sydney and Melbourne.

Using the Parent Segment field, you can create hierarchies of market segments, called Target Groups, which you can track via Oracle Business Intelligence. Each segment you create has a one on one correspondence with a Oracle Web Discoverer workbook. You cannot create or modify the workbooks although you can view the existing SQL.

Prerequisites

You must create workbooks first.

Steps

1. Navigate to **Audience** > **Segment**
2. If you are creating a new segment, then click **Create**.

   The Create Segment subtab appears.
3. If you wish to edit an existing segment, then select the segment name.

   The Segment Details subtab appears displaying the segment setup.
4. Enter or modify the name for this target or market segment.
5. In Code, enter a unique identifier.
6. Select the type of segment as a target or market segment.
7. Use the parent segment to build a segment hierarchy.
8. Enter a description for the segment.
9. Select a Oracle Web Discoverer workbook for the segment.
10. Click **Update** to save.

    The SQL Viewer displays the SQL code used by the workbook.

Using the Message Tab

You can use the Message tab to:

- Remove a message from use
- View and edit a message
- Create a message

Removing a Message From Use

Use this procedure to remove a marketing message from use.

Prerequisites

None

Steps

1. Navigate to the Message tab.
2. Deselect the **Active** check box next to the message you wish to remove from use.
3. Click **Update**.

The message can no longer be used to classify events and campaigns.

Viewing and Editing a Message

Use this procedure to view and edit a message.

Prerequisites

None

Steps

1. Navigate to the Message tab.
2. Select the hyperlink for the desired message.

   The Message Details subtab appears.
3. Edit the details as appropriate.
4. Click **Update**.

Creating a Message

Use this procedure to create a message to be used in classifying campaigns or events.

Prerequisites

None

Steps

1. Navigate to the Message tab.
2. Click **Create**.

   The Create Message subtab appears.
3. Enter the message name.

4. In the **Effective Dates** field, enter the dates this message is to used.
5. Select the message type.
6. If you wish, you can change the message owner.
7. Enter a description of the message.
8. Click **Create**.

   The Message Details subtab appears.
9. Fill in information in the different check-list items, called attributes. You can do so by clicking on their hyperlink. After you make an entry and return to this subtab, the attribute will have a check list next to it. All of the attributes are listed in the Guidelines section below.

Guidelines:

The list below includes all check-list attributes used for messages.

Only a subset of these attributes may be listed in the check list for the message you are entering. This is because different types of messages track different types of information.

- Attachments
- Metrics
- Notes
- Products

Using the Admin Tab

The Admin tab is where you set up features that include marketing activities, marketing mediums, and the custom setups which determine the checklist attributes that appear in campaigns and events.

Some of the features of the Admin tab are available for marketing super users. You can use features of this tab to:

- Set up marketing mediums for campaigns
- Set up activity classifications
- Create custom setups for campaigns and events
- Enable campaign and event approval workflow

- Create venues for events
- Create an email blitz

In addition, application implementers and administrators can use features of this tab to:

- Set up the data fields to restrict the number of columns available for list generation
- Set up deduplication rules
- Create categories and subcategories
- Create a list of similar words used to identify duplicate records
- Mapping your customer model to Oracle Marketing Online
- Create metrics

Creating an EMail Blitz

Use this procedure to create an email blitz.

Prerequisites

You must use the seeded campaign custom setup of a Direct Marketing - Email.

Steps

1. Create the email cover letter for mailmerge.
1. Create and execute a list of email recipients as described in Creating a List.
1. Create an execution campaign of campaign type Direct Marketing - Email according to the procedure found in Creating an Execution Campaign.
2. Create a schedule.
3. In the Schedule details, enter the cover letter, the list you have created, and other details according to the procedure outlined in Entering Details for the Activity You Wish to Schedule. Make sure you select the **Execute** check box Click on **Schedule.** The email blitz is executed when you click **Update** in the Schedule Details subtab.

Note: After you have selected and executed a list for a campaign schedule, the status of the list is updated from Available to Locked. You cannot reuse the same list again with that or any other campaign schedule. If you want to use same list entries again, then create the new list.

Creating an Email Cover Letter for Mail Merge

Use this general procedure to create an email cover letter that will be mail-merged and sent to your customers.

Prerequisites

None

Steps

1. Create an HTML email cover letter using any HTML editor.
2. In the cover letter, insert the fields to be mail merged where you want the mailmerge text to appear.

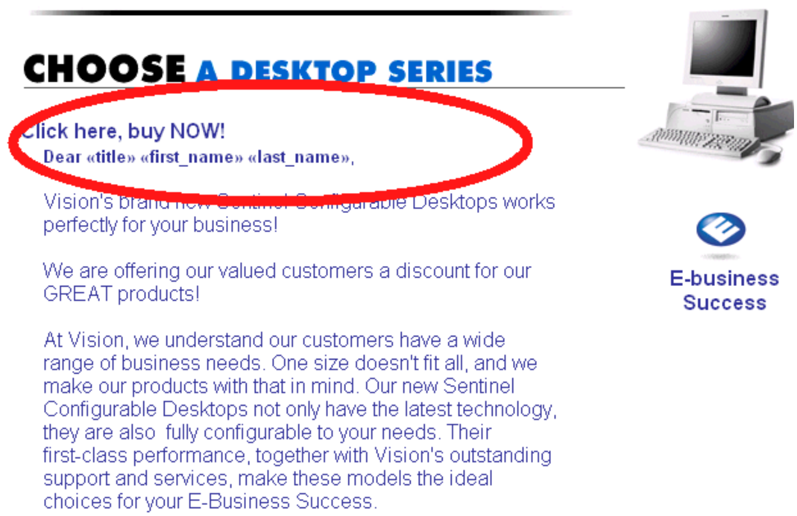
   The fields must be surrounded by special double arrow bracket characters. For example: `<<title>> <<first_name>> <<last_name>>`. You can add these double brackets into the HTML source by adding `«` for the left bracket and `»` for the right bracket. For a list of available merge fields see Available Mailmerge Fields.

   Note: These double arrow brackets are special characters. You cannot add them by typing in two left arrows and two right arrows on your keyboard.

   Here is what the HTML looks like for the salutation for the email:

   ```
   Dear&laquo;title&raquo; &laquo;first_name&raquo;
   &laquo;last_name&raquo;
   ```

   Here is a sample of what an email itself may look like with the mail merge fields circled:

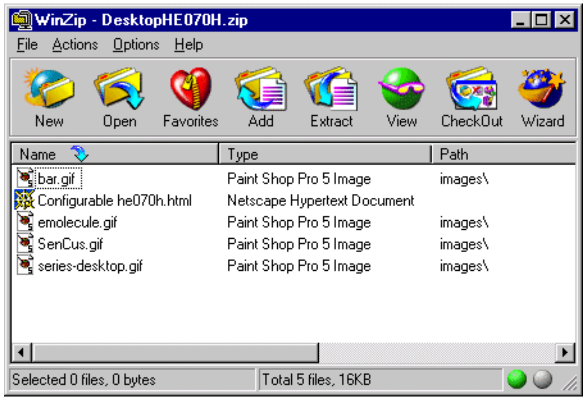


3. If the HTML cover letter you created contains images, then:

   a. Create folder named `Images` and place the images in it.

   b. Use the WinZip utility to zip up the HTML file and the Images folder with the images. You can ensure that the Image folder is preserved adding files using the Add Files with Wildcards Button.

      The resulting Zip file will look something like this:



c. Name the Zip file in a way that will enable users to recognize the cover letter contents.

4. Navigate to **Admin > Fulfillment > Master Document**
5. Click **Upload**.

   The Master Document subtab appears.
6. Click **Upload**.

   The Upload Master Document subtab appears.
7. Click **Browse**.
8. Select the zip file you have prepared with the email cover letter contents.
9. Click **Upload**.
10. The Master Document subtab appears with the uploaded zip file listed in the Master Document Name column.
11. Using the Query drop-down list select source of the mail merge fields you are using. This can be one of the two seeded queries, the Marketing Simple Query or the Marketing Detailed Query, or a query developed by your implementation team.
12. Click **Update**.

Your cover letter is now ready for use in a marketing campaign.

Searching

Use this procedure to search the Oracle Marketing Online database for messages, campaigns, deliverables, events, and lists.

> **Note:** Though you cannot search within Oracle Marketing Online for notes, attachments, tasks and other objects other than those listed above, you can find these by viewing the objects to which they are associated.

Prerequisites

None

Steps

1. If you know at least a part of the name of the object you are looking for, then use Quick Find to search for it in the database. It is preferable to use Quick Find because this method of searching gives you a direct short cut to the object you are searching for.
2. If you do not know at least the partial the name of the object or wish to search for the object using any number of criteria then:
   a. Use Advanced Search to find the object and note down its name.
   b. Use Quick Find with the object name to open the object on your window.

Searching Using Quick Find

Use this procedure to search for campaigns, events, and other objects you can access in Oracle Marketing Online.

Prerequisites

None

Steps

1. If you know at least a part of the name of the object you are looking for, then use Quick Find to search for it in the database:
   c. Select the type of object you are searching for from the Quick Find drop-down menu.

d. Enter a partial or full name. You can use % to indicate omitted words or letters.

> **Note:** You can speed up searches using the `%` wild card if you can supply the beginning or the end of a word or the sequence of words. For example, entering a search as `%results` is faster than a search for `%results%`. A search for `Q1%` is faster than a search for `%Q1%`.

e. Click **Go**.

   The Search Results window appears displaying the names of all of the found objects as hyperlinks.

f. Click on the object name to display it.

Guidelines

For more information see Different Ways of Finding Information.

Using Advanced Search

Use this procedure to search for campaigns, events, deliverables or lists in Oracle Marketing Online using a number of search criteria.

Prerequisites

None

Steps

1. Navigate to Advanced Search by clicking on the hyperlink to the right of the Quick Find field.
2. In the Object Types region, indicate what type of object you wish to search for by selecting the appropriate check box(es). You can make multiple selections.

> **Note:** You cannot search for messages or tasks using Advanced Search.

3. If you wish to search by a partial object name, its status, source code, or owner then make entries in the Simple Query Criteria region fields.

4. If you wish to search by the date an object is effective, then:
   a. Estimate the dates by entering the general ledger periods in the Start Period and End Period fields. To enter the dates, click **Go** and use the list of values.
   b. Enter more precise dates in the Dates From and Dates To fields.
5. If you wish to search by purpose, select the appropriate check boxes in the Purpose region.
6. If you wish to search by activity type and activity, then:
   a. Select the appropriate activity type check box(es).
   b. Select the desired activities in the Activity list box. You can select multiple activities by holding down the CTRL key on your keyboard.
7. If you wish to search by offer type, then select the appropriate check box(es) in the Offer Type region.
8. If you wish to search by audience segment, then select the segment(s) in the Segment list box. You can select multiple activities by holding down the CTRL key on your keyboard.
9. If you wish to search by geographical location, then click **Add** in the Geography region and use the list of values to add the location(s).
10. If you wish to search by product or by product categories, then click **Add** in the Product region and select the product(s) or product categories from the list of values.
11. If you wish to search by deliverable, then click **Add** in the Deliverable region and select the deliverable(s) from the list of values.
12. If you wish to search by partner, then click **Add** in the Partner region and select the partner(s) from the list of values.
13. If you wish to search by message, then click **Add** in the Message region and select the message(s) from the list of values.
14. If you wish to search by workbook, then click **Add** in the Workbook region and select the workbook(s) from the list of values.
15. If you wish to search by list, then click **Add** in the Existing List region and select the list(s) from the list of values.
16. Click **Search**.

    The Advanced Search Results window displays the results of your search. This list does not link to the objects themselves.

17. If you wish to view an object, then use Quick Find to search for and display the object.
18. If you wish to view more details about an object, then follow the procedure outlined in Viewing Details About Advanced Search Results.
19. If the search does not return what you are looking for, or too many items are displayed, then conduct the search again.

Viewing Details About Advanced Search Results

Use this procedure to view the results of your Advanced Search in more detail.

Prerequisites

You must perform an Advanced Search first.

Steps

1. If the search results list the object(s) you wish to view, then:
   a. Select the **Select** check box for each object you wish to view.
   b. Click **View Details**.

      A separate browser window lists information about the found items.
2. If the search does not return what you are looking for, or too many items are displayed, then click on the Refine Search hyperlink and perform the Advanced Search again using different criteria.

Entering Geography Search Criteria

Use this procedure to enter one or more geography regions as search criteria in the Advanced Search.

Prerequisites

You must have Advanced Search open.

Steps

1. Navigate to the Geography Locator window. You can open it from the Geography region of Advanced Search by clicking **Add**.

2. If you wish to restrict the selection of geographical locations to a particular geographical level, then:
   a. Make a selection from the Level drop-down list.
   b. Click **Go** to the right of the Name field.

      The list of locations is restricted to the geographical level you selected.
3. If you wish to search for a geographical location, then:
   a. In the Name field at the top of the window, enter a name or a partial name. You can use the% to substitute for missing letters.
   b. Click **Go** to the right of the Name field.

      A list of found locations appears.
4. If you wish to add all geographical locations displayed in the window then:
   a. Select the **Select All** check box at the bottom of the list.
   b. Click **Add**.

      The locations are added to the list on the Advanced Search window.
   c. If more then one page of locations displays, then click Next and repeat the same procedure.

      Note: If more than one page of locations displays, you must add each page separately. The Select All button selects only those locations visible on a page at one time.
5. If you wish to add only selected geographical locations, then:
   a. Select the check box next to each.
   b. Click **Add.**

      The locations are added to the list on the Advanced Search window.
   c. If more than one page of locations displays, then click Next to view the next page and repeat this procedure.

      Note: If more than one page of locations displays, you must add locations on each page separately. A location you select on a page does not remain selected when you view another page.

6. When you are done selecting geographical locations, click **Close**.

Entering Product Search Criteria

Use this procedure to enter one or more products or product families as search criteria in the advanced search.

Prerequisites

You must have Advanced Search open.

Steps

1. Navigate to the Product Locator window. You can open it from the Product region of Advanced Search by clicking **Add**.
2. Select whether you wish to add products or product families:
   a. From the Type drop-down, list select Product or Product Family.
   b. Click **Go** to the right of the Name field.

      The window displays the list of products or product families depending on your selection.
3. If you wish to search for a products or product families, then:
   a. In the Name field at the top of the window, enter a name or a partial name. You can use the% character to substitute for missing letters.
   b. Click **Go** to the right of the Name field.

      The window displays the list of products or product families.
4. If you wish to add all products or product families displayed in the window then:
   a. Select the **Select All** check box at the bottom of the list.
   b. Click **Add**.

      The products or product families are added to the list on the Advanced Search window.
   c. If more then one page of product or product families displays, then click Next and repeat the same procedure.

Note: If more than one page of product families displays, you must add each page separately. The Select All button selects only those products or product families visible on a page at one time.

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5. If you wish to add only selected products or product families, then:

   a. Select the check box next to each.

   b. Click **Add.**

      The products or product families are added to the list on the Advanced Search window.

   c. If more than one page of locations displays, then click Next to view the next page and repeat this procedure.

Note: If more than one page of products or product families displays, you must add locations on each page separately. A product or product family you select on a page does not remain selected when you view another page.

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6. When you are done, click **Close**.

Entering Deliverable Search Criteria

Use this procedure to enter one or more deliverables as search criteria in the advanced search.

Prerequisites

You must have Advanced Search open.

Steps

1. Navigate to the Deliverable Locator window. You can open it from the Deliverable region of Advanced Search by clicking **Add**.

2. Select whether you wish to search for a deliverable, then:

   a. Enter its name or a partial name into the Name field. You can use the % to substitute for missing letters.

   b. Click **Go**.

The window displays the list of found deliverables.

3. If you wish to add all deliverables displayed in the window as search criteria, then:
   a. Select the **Select All** check box at the bottom of the list.
   b. Click **Add**.

      The deliverables are added to the list on the Advanced Search window.
   c. If more then one page of deliverables displays, then click Next and repeat the same procedure.

Note: If more than one page of deliverables displays, you must add each page separately. The Select All button selects only those deliverables visible on a page at one time.

---

4. If you wish to add only selected deliverables, then:
   a. Select the check box next to each.
   b. Click **Add.**

      The deliverables are added to the list on the Advanced Search window.
   c. If more than one page of deliverables displays, then click Next to view the next page and repeat this procedure.

Note: If more than one page of deliverables displays, you must add locations on each page separately. A deliverable you select on a page does not remain selected when you view another page.

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5. When you are done, click **Close**.

Entering Partner Search Criteria

Use this procedure to enter one or more partners as search criteria in the advanced search.

Prerequisites

You must have Advanced Search open.

Steps

1. Navigate to the Partner Locator window. You can open it from the Partner region of Advanced Search by clicking **Add**.
2. Select whether you wish to search for a partner, then:
   a. Enter its name or a partial name into the Name field. You can use the % to substitute for missing letters.
   b. Click **Go**.

      The window displays the list of found partners.
3. If you wish to add all partners displayed in the window as search criteria, then:
   a. Select the **Select All** check box at the bottom of the list.
   b. Click **Add**.

      The partners are added to the list on the Advanced Search window.
   c. If more then one page of partners displays, then click Next and repeat the same procedure.

      Note: If more than one page of partners displays, you must add each page separately. The Select All button selects only those partners visible on a page at one time.
4. If you wish to add only selected partners, then:
   a. Select the check box next to each.
   b. Click **Add.**

      The partners are added to the list on the Advanced Search window.
   c. If more than one page of partners displays, then click Next to view the next page and repeat this procedure.

      Note: If more than one page of partners displays, you must add locations on each page separately. A partner you select on a page does not remain selected when you view another page.
5. When you are done, click **Close**.

Entering Message Search Criteria

Use this procedure to enter one or more messages as search criteria in the advanced search.

Prerequisites

You must have Advanced Search open.

Steps

1. Navigate to the Message Locator window. You can open it from the Message region of Advanced Search by clicking **Add**.
2. Select whether you wish to search for a message, then:
   a. Enter its name or a partial name into the Name field. You can use the % to substitute for missing letters.
   b. Click **Go**.

      The window displays the list of found messages.
3. If you wish to add all messages displayed in the window as search criteria, then:
   a. Select the **Select All** check box at the bottom of the list.
   b. Click **Add**.

      The messages are added to the list on the Advanced Search window.
   c. If more then one page of messages displays, then click Next and repeat the same procedure.

   Note: If more than one page of messages displays, you must add each page separately. The Select All button selects only those messages visible on a page at one time.

   ---
4. If you wish to add only selected messages, then:
   a. Select the check box next to each.
   b. Click **Add.**

      The messages are added to the list on the Advanced Search window.

c. If more than one page of messages displays, then click Next to view the next page and repeat this procedure.

Note: If more than one page of messages displays, you must add locations on each page separately. A message you select on a page does not remain selected when you view another page.

---

5. When you are done, click **Close**.

Entering Workbook Search Criteria

Use this procedure to enter one or more workbooks as search criteria in the advanced search.

Prerequisites

You must have Advanced Search open.

Steps

1. Navigate to the Workbook Locator window. You can open it from the Workbook region of Advanced Search by clicking **Add**.
2. Select whether you wish to search for a workbook, then:
   a. Enter its name or a partial name into the Name field. You can use the % to substitute for missing letters.
   b. Click **Go**.
      The window displays the list of found workbooks.
3. If you wish to add all workbooks displayed in the window as search criteria, then:
   a. Select the **Select All** check box at the bottom of the list.
   b. Click **Add**.
      The workbooks are added to the list on the Advanced Search window.
   c. If more then one page of workbooks displays, then click Next and repeat the same procedure.

Note: If more than one page of workbooks displays, you must add each page separately. The Select All button selects only those workbooks visible on a page at one time.

---

4. If you wish to add only selected workbooks, then:
   a. Select the check box next to each.
   b. Click **Add.**

      The workbooks are added to the list on the Advanced Search window.
   c. If more than one page of workbooks displays, then click Next to view the next page and repeat this procedure.

Note: If more than one page of workbooks displays, you must add locations on each page separately. A workbook you select on a page does not remain selected when you view another page.

---

5. When you are done, click **Close**.

Entering List Search Criteria

Use this procedure to enter one or more lists as search criteria in the advanced search.

Prerequisites

You must have Advanced Search open.

Steps

1. Navigate to the List Locator window. You can open it from the List region of Advanced Search by clicking **Add**.
2. Select whether you wish to search for a list, then:
   a. Enter its name or a partial name into the Name field. You can use the % to substitute for missing letters.
   b. Click **Go**.

      The window displays the list of found lists.

3. If you wish to add all lists displayed in the window as search criteria, then:
   a. Select the **Select All** check box at the bottom of the list.
   b. Click **Add**.

      The lists are added to the list on the Advanced Search window.
   c. If more then one page of lists displays, then click Next and repeat the same procedure.

      Note: If more than one page of lists displays, you must add each page separately. The Select All button selects only those lists visible on a page at one time.

      ---
4. If you wish to add only selected lists, then:
   a. Select the check box next to each.
   b. Click **Add.**

      The lists are added to the list on the Advanced Search window.
   c. If more than one page of lists displays, then click Next to view the next page and repeat this procedure.

      Note: If more than one page of lists displays, you must add locations on each page separately. A list you select on a page does not remain selected when you view another page.

      ---
5. When you are done, click **Close**.

Using the List of Values

This topic explains how to use list of values (LOV) fields in the application. These are fields with a Go button to the right.

Prerequisites

None

Steps

1. If you know at least part of the string of characters you are searching for:

a. Enter the characters you wish to search for in the field.

   You can use the percent symbol to substitute for any characters. For example, entering `jo%` searches for all of the objects starting with the letters `jo`. Entering `%jo`, searches for all of the objects ending with the letters `jo`. Searching for `j%o` searches for any string of characters beginning with `j` and ending with `o`.

   Note: You can speed up searches using the `%` wild card if you can supply the beginning or the end of a sequence of characters. For example, searching for `%results` is faster than a searching for `%results%`. A search for `Q1%` is faster than a search for `%Q1%`.

   ---

b. Click **Go**.

   The list of values window opens, displaying the results of your search.

2. If the search returns multiple pages of results, then use the First, Previous, Next, and Last buttons to navigate through the results.
3. If you wish to repeat your search with modified search criteria, then:
   a. Enter the new search string in the Search Keyword field.
   b. Click **Search**.
4. To select and enter a value from the list into the field, click on the value which appears as a hyperlink.
5. If you do not wish to make an entry, then click **Cancel**.

Troubleshooting

System Error: You have been signed out automatically.

If you receive this error:

1. Clear the cache of your browser following instructions that come with your browser.
2. Close all browser windows. If you are using Netscape, this includes all your email messages.
3. Restart the browser.
4. Log into Oracle Marketing Online.

Implementing Oracle Marketing Online

The implementation group of topics explain how to set up and customize Oracle Marketing Online.

You can customize Oracle Marketing Online are by setting up system profile options, which control the overall behavior of the product, and by setting up lists of values (LOVs) and drop-down lists for individual fields within the product.

The choices users see in the LOVs and drop-down lists come from two sources:

- Lookups you set while logged in to the Oracle Forms interface under the Oracle Marketing Administrator responsibility.
- Setups you perform in the Admin tab of Oracle Marketing Online.

For this reason, you must log into both Oracle Applications under the Oracle Marketing Administrator responsibility (this is the Forms-based interface) and the Oracle Marketing Online application (HTML interface).

Major Implementation Steps

Below are the major steps to complete an Oracle Marketing Online implementation. Use this procedure to plan out your implementation. Each step indicates whether it is required or not. Follow links to more detailed procedures.

Prerequisites

Complete installation of the CRM suite as described in:

- *Oracle System Administrator's Guide* (A75396-01), Implementation Appendix
- *Implementing CRM Applications Release 11i* (A85301-01), Marketing Applications

Steps

1. Set up an implementation user. (Required)
2. If you are implementing a new installation of Oracle Marketing Online in an environment where Oracle ERP applications are not implemented, then you must set up basic ERP functions before implementing the application itself. (Required)

3. Log into Oracle Applications under the Oracle Marketing Administrator responsibility (this is the Forms-based interface). (Required)
4. Log into the Oracle Marketing Online application (this is an HTML interface accessed through your browser). (Required)

   Throughout the implementation you will be switching between the Forms-based Oracle Marketing Administration application, which you use to set up system profiles and lookups and the HTML-based Oracle Marketing Online application itself, where most of the setup is done in the Admin tab.
5. Set up CRM foundation modules. (Required)
6. Create Oracle Marketing Online users. These users are the owners of different objects in the application. Objects include events, collateral, and campaigns.
7. Set Oracle Marketing Online lookups. (Required)
8. Set up status classifications. These are the drop-down lists that can be used to classify most Oracle Marketing Online objects, including campaigns, events, and deliverables. (Required)
9. Create category and subcategory classifications for campaigns, deliverables, events, budgets, metrics, and costs. (Optional)
10. Enable the budget tab. (Required)
11. Set up the campaign tab. (Required)
12. Set up metrics and costs for your campaigns and events. (Required)
13. Create venues for your events. (Required)
14. Set up the data fields to restrict the number of columns available for list generation. (Optional)
15. Set up deduplication rules. (Required)
16. Set up word replacement rules. These are lists of similar words used to identify duplicate records in lists. (Required)
17. Set up geographical regions. (Optional)
18. Map your customer model. This step requires consulting help. (Optional)
19. Set up system profile options. (Required)
20. Implement Oracle Web Discoverer. (Required)
21. Set up news and stock quotes for user’s home pages. (Optional)

Setting Up the Implementation User

Use this procedure to set yourself up as a user for the implementation.

Prerequisites

None

Steps

1. Log in as Sysadmin.
2. Navigate to **Security > User >Define**.
3. Create a user. (For example: <IMPLEMENT>)
4. Assign the following responsibilities to the user:
   - General Ledger Super User
   - US HRMS Manager
   - Inventory
   - CRM Administration
   - Oracle Marketing Administration
   - Oracle Marketing Super User (Self Service)
   - Preferences (Self Service)
   - System Administrator
5. Log out and log in as <IMPLEMENT>.
6. Change your password.

Setting Up ERP Applications for New Installations

Use this procedure to set up ERP applications for use with Oracle Marketing Online in new installations. This procedure covers only steps required to make ERP applications work with Oracle Marketing Online, not the steps required to implement those applications.

Steps

1. Set up Oracle General Ledger. (Required)
2. Set up Oracle Human Resources. (Required)

3. Set up Oracle Inventory. (Required)
4. Set up Advanced Pricing following the instructions specified in *Oracle Pricing User's Guide* (A77032-01). (Required)

Implementing Oracle General Ledger

Prerequisites

Knowledge of setting up Key Flexfields is a must.

Steps

1. Log in as the <IMPLEMENT> user.
2. Choose the General Ledger responsibility.
3. Set up accounting calendar types (**Setup** > **Financials** > **Calendars** > **Types**).
4. Set up the accounting calendar (**Setup** > **Financials** > **Calendar** >**Accounting**)
5. Set up currencies (**Setup** > **Currencies** > **Define**) that are needed for your implementation.
6. Set up exchange rates. (**Setup** > **Currencies** > **Rates** > **Daily**)
7. Set up accounting flexfields (**Setup** > **Financials** > **Flexfields** > **Key** > **Segments**).

   Make sure the concurrent process for flexfield compilation is complete before proceeding further.
8. Define a set of books (**Setup** > **Financial** > **Books** > **Define**).
9. Use SqlPlus to check your Set of Books (SOB) under table GL_SETS_OF_BOOKS

Implementing Oracle Human Resources

Prerequisites

You must complete your implementation of Oracle General Ledger.

Steps

1. Switch Responsibility to US HRMS Manager.

2. Define Org Types (**Other Definitions > Lookup Tables**). Org Types can be Business Group, Department, HQ, or any other types suited to your business needs.
3. Define locations (**Work Structures > Location**). These are used to set up organizations in the next step.
4. Define organizations (**Work Structures > Organization > Description**). In the Organization Classifications region, assign business groups.
5. Use SqlPlus to check your work and make a note of your ORGANIZATION_ID and BUSINESS_GROUP_ID from table HR_ALL_ORGANIZATION_UNITS.
6. Switch responsibility to System Administrator.
7. Set the site level value for profile option HR: Business Group to one of the new business groups defined above.
8. Set the responsibility-level (US HRMS Manager) value for profile option HR: Business Group to one of the new business groups defined above.
9. Set the site-level value for profile option HR: Security Profile to one of the new business groups defined above.
10. Set the responsibility-level (US HRMS Manager) value for profile option HR: Security Profile to one of the new business groups defined above.
11. Switch responsibility to US HRMS Manager.

Note: A single Organization can act as a business group, a legal entity and an operating unit. Please be very clear before starting this setup.

12. Define Legal Entity (**Workstructure > Organization >Description**):
    a. Associate the GRE/Legal Entity classification with your organization and continue with additional setups as needed.
    b. Enter the set of books.
13. Double check your work:
    a. Under **Help > Diagnostics,** examine for block HOU1 and field BUSINESS_GROUP_ID.
    b. Verify the value of BUSINESS_GROUP_ID for block $PROFILES$ and field PER_BUSINESS_GROUP_ID,

c. Verify the value of BUSINESS_GROUP_ID.

14. Define your operating unit (**Workstructure > Organization >Description**)

    a. Associate the Operating Unit classification with your organization and continue with additional setups needed.

    b. Enter the legal entity.

    c. Switch to the Sysadmin responsibility.

    d. Change the site level profile option for MO: Operating Unit to the operating unit you defined.

15. Switch to the HR responsibility.

16. Define the HR Organization (**Workstructure > Organization > Description**)

    a. Associate the HR Organization classification with your organization.

17. Define Inventory Organization (**Workstructure > Organization > Description**)

    a. Associate the Inventory Organization classification.

    b. Click **Others**.

    c. In Accounting Information, enter the legal entity, the set of books, and the operating unit created earlier.

    d. Use SqlPlus to double-check data in tables HR_ALL_ORGANIZATION_UNITS, HR_ORGANIZATION_INFORMATION, HR_LEGAL_ENTITIES, and HR_OPERATING_UNITS.

18. If you wish to enable multi-organizational features for new installations, then run the Adadmin concurrent program to enable Multi-Org at site level. Adadmin will pick the MO: Operating Unit profile value set at the site level.

19. If you are implementing a new installation you must create employees:

    a. Define the employee. (**People > Enter and Maintain**)

    b. Define the manager of the employee by clicking **Assignment**. This step also assigns the employee to an organization. The manager's organization must be one of an HR business groups you have defined previously.

Note: You must enter the manager for an employee for Oracle Marketing Online Workflow approval to work correctly. If you are creating a new business group instead of using the seeded business group, and if you receive the flexfield error (Code = GRP), then you must set up the People Group flexfield.

---

20. Set up a Business Unit:

   a. Navigate to **US HR MANAGER->Other Definitions->Look Up Tables.**

   b. In the Look Up Tables form, search for and set up values for ORG_TYPE.

   c. In the CODE field for ORG_TYPE, enter the value `BU (`This is the key).

   d. In the meaning field enter the value `Business Unit` and a free-form description.

   e. As an option, you may also define Company with the code `COMP` and Department with the code `DEPT`.

   f. After you have defined your ORG_TYPE, you must describe your ORG_TYPE. This is done by navigating to **US HR MANAGER->Work Structures->Org.-> Description**.

   g. Once you have opened the Description form, select the New tab.

   h. In the Name field, enter the business unit name. For example, Business Computer Organization.

   i. Using the Type list of values, select the Business Unit that you defined previously.

   j. Enter an address.

   k. Save the record.

Implementing Inventory

You must implement Oracle Inventory using this procedure if you wish to make marketing deliverables and events available through other CRM applications, including Oracle iStore and Oracle TeleSales.

Only the steps listed here are required to set up Oracle Marketing Online for use with Oracle Inventory. For more details on how to carry out these steps, please see *Oracle Inventory User's Guide* (A83505–01).

Prerequisites

You must complete your implementation of Oracle General Ledger.

Steps

1. Switch Responsibility to Inventory.
2. Define the Item Flexfield (**Setup > Flexfields > Key > Segments**).
3. Make sure you compile each flexfield before preceding to the next step.
4. Define the Item Categories flexfield (**Setup > Flexfields > Key > Segments**).
5. Define the Item Catalog Group flexfield (**Setup > Flexfields > Key > Segments**).
6. Define the Stock Locator flexfield (**Setup > Flexfields > Key > Segments**).
7. Define Sales Orders flexfield (**Setup > Flexfields > Key > Segments**).
8. Define locations (**Setup > Organization > Location**).
9. Define the organization calendar (**Setup > Organization > Calendar**).
10. Switch responsibility to System Administrator.
11. Set the value at the responsibility level for Profile Option (HR:User Type) to `HR User`.
12. Switch responsibility to Inventory.
13. Define the inventory organization (**Setup > Organization > Organization**).
14. Define the organization parameters (**Setup > Organization > Organization Parameter**). You can do this by clicking **Others** in the previous step).
15. Change the organization (**Setup > Change Organization**).
16. Define Unit of Measure Classes (**Setup > Unit of Measure > Classes**).
17. Define the Unit of Measure (**Setup > Unit of Measure > Unit of Measure**).
18. Define Unit of Measure conversions (**Setup > Unit of Measure > Conversions**).
19. Define category codes **(Setup > Items > Categories > Category Codes**).
20. Define category sets (**Setup > Items > Categories > Category Sets**).
21. Define default category sets (**Setup > Items > Categories > Default Category Sets**).
22. Log in as a System Administrator.

23. Set the following system profile options at the application level:
    - INV: Default Primary Unit of Measure
    - INV: Accounting Category Set
    - INV: Item Master Flexfield
    - INV: Product Family Item Template Name
24. Log in under the Marketing Administrator responsibility.
25. Set the following system profile options at the site level:
    - AMS: Item Validation Master Organization
    - AMS: Pricelist Header Name for Events.
    - AMS: Should Call to Inventory Module. Set to Y.
    - AMS: Should Call to Pricing Module. Set to Y.

Setting Up CRM Foundation Modules

1. You must set up the following modules in CRM Foundation:

- **Resource manager types:** You must set up people and venues.
- **Resource manager roles**: These are used in execution events for the Resource check-list attribute.
- **Note types**: These are used in the Notes check-list attribute in the field Note Types.
- **Source to Note-Type Mapping**: This determines which notes show up in the Note check-list attribute under campaigns, events, deliverables, messages, and all of the other Oracle Marketing Online objects.
- **Task types**: These appear in the Task Type drop-down list.
- **Task status:** The values you add here determine what appears in the Status drop-down list for tasks.
- **Task priority**: This determines the values that appear in the Priority drop-down list for tasks.

2. Import geographic hierarchies (Required):
   a. Log into Oracle Applications under the CRM Administration responsiblity.
   b. Run the concurrent program Load Geographic Hierarchies.

Guidelines

Refer to the corresponding topic in *CRM Foundation Implementation Guide* (A86122-01). You can find relevant information in these topics:

Information Sources for CRM Setups

CRM Foundation Module	CRM Foundation Concepts Topic
Resource Manager Roles	Understanding Resource Manager Implementing Resource Manager
Note Types	Implementing Notes
Task Type Task Status Task Priority	Implementing Task Manager

Creating Oracle Marketing Online Users

Use this procedure to create users for Oracle Marketing Online. These are referred to in the application as owners. The procedure for creating users requires two additional steps beyond the usual procedure of setting up users in the Oracle Human Resources application

Prerequisites

None

Steps

1. Log on as the implementer.
2. Choose the responsibility: Human Resources.
3. Create an employee.
   a. Navigate to **People > Enter and Maintain**.
   b. Make sure Person Type is Employee.
   c. Enter all other required fields.
4. Switch to the System Administrator responsibility.
5. Create Oracle Marketing Online users:
   a. Create a user.

b. Assign Oracle Marketing Super User as the responsibility.

c. Assign the newly created person in the Person field.

d. Open the System Profile Values window.

e. Set up the following Profile options for the user:

   * ICX_LANGUAGE. Must be set to your language, for example, American English.

   * JTF_PROFILE_DEFAULT_APPLICATION: Enter "530". This takes users directly to Oracle Marketing Online when they sign on.

   * JTF_PROFILE_DEFAULT_RESPONSIBILITY: Enter "21706"

Note: The DEFAULT_APPLICATION and DEFAULT_ RESPONSIBILITY values are important because they determine the menu structure that is displayed when the user logs in. If you want your application menus to launch when the user logs in, then you must set the default application to your appID and default responsibility to the respID that maps to the menu structure.

---

6. Import the employee as a resource:

   a. Switch to the CRM Administrator responsibility.

   b. Navigate to **Maintain Resource > Import Resources.**

   c. In the Name field, enter the employee you have created.

   d. Click **Search.**

   e. Click **Create Resource.**

   f. Click **OK**.

   g. Click **Save Resources.**

   h. Click **Details** to verify the User ID you created.

Setting Up Oracle Marketing Online Lookups

Oracle Marketing Online includes lookups with three different levels of modification:

- **System**: The implementer can only change the wording of a list of value (LOV) choices the user sees on the screen. No deletions or additions are allowed.
- **Extensible**: The implementer can change both the wording of the LOV choices and add new choices for the user.
- **User**: The implementer can change the lookup completely, deleting and adding LOV choices at will.

The lookup table in this section lists the three different types of lookups alphabetically. Included are their seeded values, navigation paths, and the names of the fields they affect.

About Navigation Paths in the Lookup Table

The navigation paths are included to give you an idea what areas of the application are affected by each lookup. Some lookups may affect a field that is found in multiple tabs. Not all of these are covered. Other lookups affect check-list attributes for campaigns and events and require you to navigate through a campaign or event you have created. You may not be able to navigate to that attribute through every campaign or event because which attributes appear depends on the way you implement custom setups.

Here is how to read the navigation paths in this table:

- Campaign > *any campaign* > Schedule

  Navigate to the Campaign tab, drill down on any campaign, select the Schedule check-list attribute.

- Event > Execution Event > *any execution event* > Registration

  Navigate to the Event tab, select the Execution Event subtab, drill down on any execution event, and select the Registration check-list attribute.

- Campaign > Rollup or Execution Campaign > *any campaign* > Offers > *lump-sum offer*

  Navigate to the Campaign tab, select either the Rollup Campaign or Execution Campaign subtab, drill down on any campaign that has a Offers attribute, select the Offers attribute, and create a lump-sum offer or examine the details of an existing one.

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_ACCESS_TYPE	GROUP	Team	Campaign > any campaign > Team	User/Role	System
	USER	User			
AMS_APPROVAL_TYPE	BOTH	Theme and Budget Approval	Admin > Custom Setup	Enables one or both of the following fields: Theme Approval, Budget Approval	System
	BUDGET	Budget			
	THEME	Theme			
AMS_ATTACHMENT_TYPE	FILE	File	Attachment check-list attribute used in all tabs.	Type (Classification for attachments)	Extensible
	URL	URL			
AMS_BUDGET_APPROVAL	APPROVED	Approved	Budget > *any budget*	Status (of budget)	User
	CLOSED	Accounting Closed			
	NEW	Planning			
	PENDING	Pending Approval			
	REJECTED	Rejected by Approver			
AMS_BUDGET_TRANS_TYPE	CREDIT	Credit	Budget > *any budget*	Specifies whether posting to General Ledger is a credit or a debit.	User
	DEBIT	Debit			
AMS_CAMPAIGN_PURPOSE	AWARENESS	Awareness	Campaign > *any campaign* > Purpose	Purpose	Extensible
	LEAD	Lead Generation			
	LEAD_MATURATION	Lead Maturation			
	SALES_READINESS	Sales Readiness			
AMS_CAMPAIGN_SCHEDULE_STATUS	ACTIVE	Active	Campaign > *any campaign* > Schedule	Status	System
	ARCHIVED	Archived			
	BOOKED	Booked			
	CANCELLED	Cancelled			
	COMPLETED	Completed			
	NEW	New			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_CAMPAIGN_STATUS	ACTIVE	Active	Campaign > *any campaign*	Status	System
	ARCHIVED	Archived			
	AVAILABLE	Available			
	CANCELLED	Cancelled			
	COMPLETED	Completed			
	DENIED_BA	Denied - Budget Approval			
	DENIED_TA	Denied - Theme Approval			
	NEW	New			
	ON_HOLD	On-hold			
	PLANNING	Planning			
	SUBMITTED_BA	Submitted - Budget Approval			
	SUBMITTED_TA	Submitted - Theme Approval			
AMS_CHANNEL_RATING	BAD	Bad	Admin > General > Marketing Medium	Rating	Extensible
	EXCELLENT	Excellent			
	GOOD	Good			
	MODERATE	Moderate			
	VGOOD	Very Good			
AMS_CHANNEL_TYPE	EXTERNAL	External	Admin > General > Marketing Medium	Type	System
	INTERNAL	Internal			
AMS_DELIV_STATUS	ARCHIVED	Archived	Campaign > *any campaign* > Deliverable> *any deliverable*	Status (deliverable)	System
	AVAILABLE	Available			
	CANCELLED	Cancelled			
	DENIED_BA	Denied - Budget Approval			
	NEW	New			
	SUBMITTED_BA	Submitted - Budget Approval			
	SUPERCEDED	Superseded			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_DELIVERY_MEDIA_TYPE	ISEMINAR	iSeminar	Event > Execution Event > *any execution event*	Delivery Method	Extensible
	ON_SITE	On Site			
	WEB	Web			
AMS_EVENT_AGENDA_STATUS	CONFIRMED	Confirmed	Event > Execution Event > *any execution event* > Agenda	Status (event agenda)	System
	UNCONFIRMED	Unconfirmed			
AMS_EVENT_ATTENDANCE_FAILURE	AGENDA_CHANGE	Agenda Change	Event > Execution Event > *any execution event* > Registration > View Reason (View Reason is a hyperlink on the Registration attribute)	Reason	Extensible
	DISASTER	Natural Disaster			
	PERSONAL_EMERGENCY	Personal Emergency			
	SCHEDULE_CONFLICT	Schedule Conflict			
	SPEAKER_CHANGE	Speaker Change			
	VENUE_CHANGE	Venue Change			
	WORK_EMERGENCY	Work Emergency			
AMS_EVENT_CERT_CREDIT_TYPE	GENERAL	General	Event > Execution Event > *any execution event* > Registration	Credit Type	User
AMS_EVENT_DAY	FIVE	5	Event > *any rollup or executive event* > Event Agenda	Day	System
	FOUR	4			
	ONE	1			
	THREE	3			
	TWO	2			
AMS_EVENT_PAYMENT_STATUS	COMP	Complimentary	Event > Execution Event > *any execution event* > Registration	Marketing Event Payment Status	System
	FREE	Free			
	INVOICED	Invoiced			
	PAID	Paid			
	REFUNDED	Refunded			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_EVENT_REG_ STATUS	CANCELLED	Cancelled	Event > Execution Event > *any execution event* > Registration	Status (event registration)	System
	ENROLLED	Enrolled			
	REGISTERED	Registered			
	TARGETED	Targeted			
	WAITLISTED	Wait-listed			
AMS_EVENT_RESOURCE_ TYPE	AMS_PEOPLE	People	Event > Execution or Rollup Event > *any event* > Resources	Type	System
	AMS_VENUES	Venues			
AMS_EVENT_SPEAKER_ STATUS	BOOKED	Booked	Event > Execution Event > *any execution event* > Event Agenda	Status (speaker)	System
	CANCELLED	Cancelled			
	CONFIRMED	Confirmed			
	SCHEDULED	Scheduled			
AMS_EVENT_STATUS	ACTIVE	Active	Event	Marketing Event Status	System
	ARCHIVED	Archived			
	AVAILABLE	Available			
	CANCELLED	Cancelled			
	CLOSED	Closed			
	DENIED_BA	Denied Budget Approval			
	DENIED_TA	Denied Theme Approval			
	NEW	New			
	ON_HOLD	On Hold			
	PLANNING	Planning			
	SUBMITTED_BA	Submitted Budget Approval			
	SUBMITTED_TA	Submitted Theme Approval			
AMS_EVENT_STREAM_ TYPE	A	A	Event > Rollup or Execution Event > *any event* > Event Agenda	Track	Extensible
	B	B			
	C	C			
	D	D			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_EVENT_TYPE	BRIEFING	Briefing	Event	Type	System
	CONFERENCE	Conference			
	EXHIBITION	Exhibition			
	HOSPITALITY	Hospitality			
	INTERNAL_ EVENT	Internal Event			
	LAUNCH	Launch			
	SEMINAR	Seminar			
	SPEAKING_ ENGAGEMENT	Speaking Engagement			
	SPONSORSHIP_ EVENT	Sponsorship			
	TRADE_SHOW	Trade Show			
	WEB_SEMINAR	Web Seminar			
	WORKSHOP	Workshop			
AMS_EVENT_WAITLIST_ ACTION	FIRST_COME_ FIRST	First Come First	Event > Execution Event > *any execution event* > Registration	Rule (for wait list)	System
AMS_FCAST_BASE_UOL_ SOURCE			For N-tier marketing applications only. Affects budgets and claims.		
AMS_FCAST_PERIOD_ VIEW			For N-tier marketing applications only. Affects budgets and claims.		
AMS_FCAST_UOM	CS	CS	For N-tier marketing applications only. Affects budgets and claims.		Extensible
	EA	EA			
	USD	USD			
AMS_FND_ALLOC_ ALLOC_BASIS	EVEN	Even distribution	Budget > Allocation' The method of fund allocation to budgets		Extensible

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_FND_ALLOC_UOM	USD	USD	Unit of measure for fund allocations		Extensible
AMS_FORMULA_TYPE	ALLOCATION	Allocation	For N-tier marketing applications only. Affects budgets and claims.		Extensible
	HOLDBACK	Hold Back			
AMS_FUND_SOURCE	CAMP	Campaign	Campaign > *any campaign* > Budget	Type	System
	EVEH	Rollup Event			
	EVEO	Execution Event			
	FUND	Budget			
AMS_IMPORT_STATUS	ARCHIVED	Archived	Audience>Import	Status	System
	AVAILABLE	Available			
	NEW	New			
	PROCESSED	Processed			
	PROCESSED-INC OMPLETE	Processed - Incomplete			
AMS_IMPORT_TYPE	EVENT	Event	Audience > Import > *any list*	Type	System
	LEAD	Lead			
	RESPONSE	Response			
	SOURCE	Rented List			
AMS_IMP_DELIMITER_ TYPE		"Double Quotation	Audience > Import > Create	Field Enclosed by	System
		'Single Quotation			
	,	Comma			
	;	Semi-colon			
	FIXED	Fixed Length			
	SPACE	Space			
	TAB	Tab			
AMS_LIST_ROW_SELECT_ TYPE	NTH_RECORD	Nth Record	Audience > Audience > *any list*	Selection Size	System
	RANDOM	Random			
	STANDARD	Standard			
AMS_LIST_SEARCH	A	All lists	Audience > Audience	View	System
	U	My lists			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_LIST_SELECT_ ACTION	EXCLUDE	Exclude	Audience > Audience > *any list*	Action	System
	INCLUDE	Include	Selection criteria for Action fields		
	INTERSECT	Intersect			
AMS_LIST_SELECT_TYPE	CELL	Target Segment	Audience > Audience > *any list*	Type	System
	DIWB	WorkBook			
	LIST	Existing List			
AMS_LIST_STATUS	ARCHIVED	Archived	Audience > Audience > *any list*	Status	System
	AVAILABLE	Available			
	LOCKED	Locked			
	NEW	New			
	PENDING	Pending			
	RESERVED	Reserved			
AMS_LIST_TYPE	TARGET	Target	Audience > Audience > *any list*	Type	System
	TEMPLATE	Template			
AMS_MARKET_ELIG_ TYPE	GEO_AREA	Geographic Area	Budget > *any budget* > Allocation	N-tier marketing use only	System
	MARKET_ SEGEMENT	Market Segment			
	TERRITORY	Territory			
AMS_MEDIA_TYPE	BROADCAST	Advertising	Admin > Activity	Activity Type	System
	DEAL	Deal	(affects all Activity Type fields in campaigns)		
	DIRECT_ MARKETING	Direct Marketing			
	EVENTS	Events			
	INTERNET	iMarketing			
	IN_STORE	In-store			
	PUBLIC_ RELATIONS	Press and Analyst Relations			
	TRADE_ PROMOTION	Trade Promotion			
AMS_MESSAGE_TYPE	BRAND	Product Family	Message	Type	Extensible
	PRODUCT	Product			
	VISION	Vision			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_METRIC_ACCRUAL_TYPE	FIXED	Fixed	For internal system use only. Does not affect UI		System
	VARIABLE	Variable			
AMS_METRIC_VALUE_TYPE	N	Numeric	Admin > General > Metrics	Return Value	System
	R	Ratio			
AMS_MKT_SEGMENT_TYPE	CELL	Target Segment	Audience > Segment > Create	Type	System
	MARKET_SEGMENT	Market Segment			
AMS_OBJECT_USAGE_TYPE	CREATED	Created	Campaign > Rollup or Execution Campaign > *any campaign* > Deliverable	Usage	System
	USED_BY	Used By			
AMS_OFFER_LUMPSUM_PAYMENT	ACCRUE	Accrue	Campaign > Rollup or Execution Campaign > *any campaign* > Offers > *lump-sum offer*	Payment Type (in Lumpsum offers only)	Extensible
	CHECK	Issue Check			
AMS_OFFER_STATUS	ACTIVE	Active	Campaign > *any campaign* > Offer	Status	System
	CLOSED	Closed			
	DRAFT	Draft			
	PENDING	Pending			
	REJECTED	Rejected			
AMS_OFFER_TYPE	ACCRUAL	Accruals	Campaign > *any campaign* > Offer	Type	System
	LUMPSUM	Lump Sum			
	OFF_INVOICE	Off Invoice			
	OID	Promotional Goods			
	ORDER	Order value			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_PRIORITY	FAST_TRACK	Fast Track	Campaign > *any campaign*	Priority	Extensible
	HIGH	High			
	STANDARD	Standard			
	LOW	Low			
	MEDIUM	Medium			
	VERY HIGH	Very High			
AMS_PRODUCT_LEVEL	FAMILY	Product Family	Campaign > *any campaign* > Products	Level	System
	PRODUCT	Product			
AMS_RESOURCE_STATUS	BOOKED	Booked	Event > Execution Event > *any event* > Resources	Status	System
	CONFIRMED	Confirmed			
AMS_TRIGGER_ FREQUENCY_TYPE	DAILY	Daily	Campaign > *any campaign* > Trigger > Setup	Frequency	System
	HOURLY	Hourly			
	MONTHLY	Monthly			
	NONE	None			
	QUARTERLY	Quarterly			
	WEEKLY	Weekly			
	YEARLY	Yearly			
AMS_TRIGGER_TYPE	DATE	Date	Campaign > *any campaign* > Trigger	Comparison Type	System
	METRIC_ METRIC	Metric to Metric			
	METRIC_VALUE	Metric to Value			
	METRIC_ WORKBOOK	Metric to Workbook			
AMS_VENUE_TYPE	CONVENTION_ CENTER	Convention Center	Admin > General > Venue	Venue Type	User
	HOTEL	Hotel			
	KIOSK_BOOTH	Kiosk/Booth			
OZF_FUND_REQUEST_ STATUS	APPROVED	Approved	Campaign > *any campaign* > Budget	Status	System
	PENDING	Pending Approval			
	REJECTED	Rejected			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
OZF_FUND_STATUS	ACTIVE	Active	Budget> Budgets > Create	Status	System
	CLOSED	Closed			
	DRAFT	Draft			
	PENDING	Pending Approval			
OZF_FUND_TYPE	FIXED	Fixed	Budget> Budgets > Create	Type	System
	FULLY ACCRUED	Fully Accrued			
	STATISTICAL	Statistical			
OZF_PAYMENT_METHOD	ADJUSTMENT	Adjustment	N-tier marketing use only. Affects budgets and claims.		System
	CHECK	Check			
	CREDIT_MEMO	Credit Memo			
	DEBIT_MEMO	Debit Memo			
	REJECT	Reject			
	WRITE_OFF	Write Off			
OZF_UTILIZATION_TYPE	ACCRUAL	Accrual	N-tier marketing use only. Affects budgets and claims.	Utilization Type	System
	ADJUSTMENT	Adjustment			
	UTILIZED	Utilized			

Setting Up Status Classifications

Use this procedure to set up the status classifications used to categorize objects ranging from deliverables to speakers. The statuses you set up appear in the Status drop-down lists in each object.

You can use this procedure to set up status designations for the following objects:

- List import
- Campaign schedules
- Campaigns
- Deliverables
- Marketing event agendas
- Marketing event registration

- Marketing event speakers
- Marketing events

For example, you may want to classify deliverables as draft or approved, and speakers as contacted, confirmed, or cancelled.

Steps

1. Navigate to **Admin > General >User Status**.
2. From the Activity drop-down list, select the type of classification you wish to set up.
3. Use the System Status drop-down list select the status you want to map the classification to.
4. In User Status, enter the status.
5. If you wish to make this classification available only for a limited period of time, then enter a range of dates in the Start Date and End Date fields.
6. Click **Update**.

Creating and Editing Categories and Subcategories

Use this procedure to create both the Category and Subcategory drop-down lists used to classify campaigns, deliverables, events, budgets, metrics, and costs. The only difference between creating a category and a subcategory is that you specify a parent for a subcategory.

Prerequisites

If you are creating a subcategory, then you must create the parent category first.

Steps

1. Navigate to **Admin > General >Category.**
2. If you wish to create a new category or subcategory, then click **Create**. The Create Category subtab appears.
3. If you wish to edit a previous entry, then select the existing category or subcategory. The Category Details subtab appears.
4. Enter the name of the new category or subcategory. This name will appear in the Category or Subcategory drop-down list.

5. From the Created For drop-down list, select the object for which you are creating this category or subcategory.
6. If you are creating a subcategory, then, in Parent Category, click **Go** and use the list of values to enter the parent category.
7. Leave Liability Account and Adjustment Account blank. These are used by N-tier marketing implementations only.
8. Enter an optional description.
9. Make sure the **Enabled** check box is selected. Deselecting removes this category or subcategory from use.
10. Click **Update**.

Enabling the Budget Tab

Use this procedure to enable the budget tab.

Prerequisites

None

Steps

1. Log on to Oracle Applications under the Application Developer responsibility.
2. Navigate to **Applications > Menu**.
3. From the View menu, choose **Find**.
4. Find "Oracle Marketing Root Menu".
5. In the Navigator Prompt column, locate Budget.
6. In the Budget record, use the list of values to make the following entries:
   a. For Submenu, enter OZF_BUDGET_SUBMENU.
   b. For Function, enter OZF_BUDGET_OVERVIEW.
7. Save the record.
8. Bounce your Apache Server.

Setting Up the Campaign Tab

Use this procedure to set up the Campaign tab.

Prerequisites

Log into Oracle Marketing Online.

Steps

1. Set up the marketing mediums used to execute campaign activities. Please note that when a marketing medium is associated with an activity, it cannot be associated with another activity in the same time period. (Required)
2. Set up activities.(Required)
3. Create custom setups that will be used in campaigns and events. (Required)

Setting Up Geographical Regions

Use this procedure to set up geographical regions that are used to target campaigns.

Prerequisites

None

Steps

1. If you wish to change the names of geographical levels the user sees in the Level drop-down list, then:
   a. Navigate to **Admin > Geography > Location Type.**
   b. For each level, you can modify the existing Location Name. The user sees the Location Name in the Campaign Geography attribute list of values (LOV). You cannot add any additional locations or modify the preset levels.
   c. Enter an optional description.
   d. Click **Update**.
2. Navigate to **Admin > Geography > Geographic Area.**
3. Enter the geographical hierarchy for your campaigns:
   a. Click **Create**.

      The Geographic Areas dialog appears.
   b. Use the Parent list of values (LOV) to enter a parent region for the child region you are creating. For example, if your company is targeting campaigns by different counties, then you will enter a specific state as a parent.

The Type field is filled in automatically.

c. In the Child region, use the Type drop-down list to enter the type of area you are creating. In our example, county.
d. Enter a name and optional short name for the area.
e. Enter a start date.
f. If you wish for this geographical area to expire, then enter an end date.
g. Click **Update**.

Mapping Your Customer Model on to Oracle Marketing Online

You can map your existing customer model to Oracle Marketing Online. Contact Oracle Consulting for further information.

Setting Up Data Fields for Lists

Use this procedure to determine which AMS_LIST_ENTRIES and AMS_IMPORT_SOURCELINES table columns are available for list generation. Both tables contain 256 user definable columns. By default, all columns are available. Use caution if you choose to carry out this procedure. If you make some of the columns unavailable, then you cannot make them available for list generation later on.

Prerequisites

None

Steps

1. Navigate to **Admin > List > Data Fields.**
2. Use the View drop-down list to select a table.
3. Deselect the **Active** check box for any field you wish to disable.
4. Click **Update**.

Setting Up Deduplication Rules

Use this procedure to determine which field(s) (table columns) will be used for deduping. The software uses the logical AND for deduping. This means that if you use multiple fields for deduping in a rule, then all of the fields have to match.

Prerequisites

None

Steps

1. Navigate to **Admin > List > Deduplication Rules**
2. If you wish to create a new deduplication rule, then:
   a. Enter the rule name in the empty text box in the Rule Name column.
   b. Enter an optional description.
   c. From the Type drop-down list, select what type of list this rule will apply to.
   d. Click **Update**.

      The new rule appears in the list.
3. Select the name of the rule you just created or you wish to edit.

   The List Rule subtab appears.
4. If you wish to add a column that will be used for deduplication, then:
   a. Click **Go** in the Column Name field and use the list of values to enter the name of that column.
   b. In Data Length, enter the number of characters to be matched. For example, if you specify 5 on a last name, then any two last names with the first five matching characters will be considered duplicates.
   c. Click **Update**.
5. If you wish to remove a field from the rule, then:
   a. Select the **Remove** check box next to the rule you wish to remove.
   b. Click **Update**.

Setting Up Word Replacement Rules

The Word replacement rules you enter using this procedure tell the application what words may be potential duplicates of each other. For example, a customer with the name of Robert Smith may be the same customer with the name of Bill Smith. Use this procedure to set up potential duplicate words for specific tables and columns.

Steps

1. Navigate to **Admin > List > Word Replacement**

   The Create Word Replacement subtab appears.

2. In the Original Word field, enter the target word, for example, Robert.
3. In the Replacement Word field, enter the duplicate word, for example, Bob.
4. Click **Update**.
5. Click the Details link for the word you just entered.

   The List Word Replace Fields region appears.

6. Use the Field Table Name drop-down list to select the table for which you wish to use for this entry.
7. Use the Field Column Name list of values to enter the name of the column you wish to use.
8. Click **Update**.
9. If you wish to apply this entry to multiple columns, make additional entries in the Field Table Name and Field Column Name fields.

Setting Oracle Marketing Online System Profile Options

You can set the following system profile options:

Oracle Marketing Online System Profile Options

PROFILE NAME	PROFILE DESCRIPTION
AMS_AUTO_REGISTER_FLAG	If set to Yes, the profile automatically registers an individual on a wait list for an event when an enrollee cancels. Can be set at: Site, Application
AMS_CALL_CENTER_ENABLED	Setting this system profile option to Yes enables the transfer of data into Oracle Call Center. Can be set at: Site, Application
AMS_CAMPAIGN_DISPLAY_VERSION	AMS: Campaign Display Version Can be set at: Site
AMS_CAMPAIGN_DEFAULT_CALENDER	AMS: Marketing Calendar Can be set at: Site

Oracle Marketing Online System Profile Options

PROFILE NAME	PROFILE DESCRIPTION
AMS_CONF_CODE_PREFIX	This prefix is added to the generated confirmation code for event registrations. The code can be alphanumeric, for example, a company name. Can be set at: Site, Application
AMS_COPY_EVH_TO_EVO	Enables copying Rollup Event information to its Execution Events. Can be set at: Site
AMS_CURR_CONVERSION_ TYPE	This profile is used to specify the Oracle General Ledger conversion type that is used for Oracle Marketing Online transactions. For example, the currency conversion rate can be determined by a corporate conversion rate or a daily spot rate. Can be set at: Site, Application
AMS_DEFAULT_CURR_CODE	Determines the currency used for price list creation. Can be set at: Site
AMS:DEFAULT_TASK_RULE	AMS: Default Task Rule Can be set at: Application, Site
AMS:DEFAULT_TIMEOUT	AMS: Default Time Out Use For Can be set at: Site
AMS_HZ_DEDUPE_RULE	Specifies which rule is used to control unwanted duplicates when customers are saved in the customer master table HZ_PARTIES. Can be set at: Site, Application
AMS_IMP_CTL_PATH	Specifies the path to the SQL*Loader control file used for importing data. You must set this profile to run the AMSIPROC concurrent program. Can be set at: Site
AMS_IMP_DATA_PATH	Specifies the path for the data file to be imported. You must set this profile to run the AMSIPROC concurrent program. Default = /amsdev/ams/11.5/bin/ Can be set at: Site

Oracle Marketing Online System Profile Options

PROFILE NAME	PROFILE DESCRIPTION
AMS_IMP_DEDUPE_RULES	Specifies the rule the application follows to search for duplicates in the imported file itself. You must set this profile to run the AMSIPROC concurrent program. Can be set at: Site, Application
AMS_INV_API_CALLOUT	AMS: Should Call to Inventory Can be set at: Site
AMS_ITEM_ORGANIZATION_ ID	Determines the inventory organization (Master Organization) for the inventory items created for collateral and events in Oracle Marketing Online. Can be set at: Site, Application
AMS_LOWEST_ NOTIFICATION_LEVEL	AMS: Lowest importance level f Can be set at: Site
AMS_NEWS_PER_COMPANY	Determines the number of news items to be displayed for each company listed on a user's home page. Users set this profile using the Preferences tab in the application. Can be set at: Site, Application
AMS_NUM_BIN_ITEMS	Determines the number of items to be displayed in each of the bins on the home page. Users can set this profile using the Preferences tab in the application. Can be set at: Site, Application
AMS_PRICELIST_HEADER_ NAME	All Events pricing will align under this price list header. Can be set at: Site
AMS_QP_PRICING_CALLOUT	AMS: Should Call to Pricing Mo Can be set at: Site
AMS_SRCGEN_DATE_ PATTERN	AMS: Source Code Date Format Can be set at: Site
AMS_SRCGEN_SEQUENCE_ LENGTH	AMS: Source Code Sequence Length Can be set at: Site
AMS_SRCGEN_USER_CITY	AMS: User country.

Oracle Marketing Online System Profile Options

PROFILE NAME	PROFILE DESCRIPTION
AMS_STOCK_SYMBOLS	Determines which stock information displays on the home page. Enter the desired stock symbols. Users can set up this list using the Preferences tab in the application. Can be set at: Site, Application
AMS_SYSTEM_TIMEZONE_ID	Enter the time zone for the system that runs system the Concurrent Manager. This profile option is required only for organizations working across multiple time zones. Can be set at: Site
AMS_TIME_FORMAT	Controls the format in which time is displayed in Oracle Marketing Online. Can be set at: Site, Application
AMS_USER_DEFAULT_TEAM	AMS: Default Team for User Can be set at: Site, Application, Responsibility, User
AMS_USER_TIMEZONE_ID	User's time zone. This profile option is required only for organizations working across multiple time zones. Can be set at: Site, Application
AMV_PROFILE_DEFAULT_ TICKER	Can be set at: Site
AMV_PROFILES_NEWS_ITEMS	Can be set at: Site, User
OZF_AP_SOURCE	OZF: AP Source for N-Tier Marketing Can be set at: Site
OZF_ARCM_BATCH_SOURCE	OZF: Credit Memo Batch Source for N-Tier Marketing Can be set at: Site
OZF_ARDM_BATCH_SOURCE	OZF: Debit Memo Batch Source for N-Tier Marketing Can be set at: Site

Implementing Oracle Web Discoverer

Use this procedure to install and implement Oracle Web Discoverer.

Prerequisites

None

Steps

1. Install Oracle Web Discoverer from your CD. This includes the product and the patch. Make sure that you use the Oracle installer Discoverer provides. Use default Oracle Home while installing.
2. Verify your work:
   a. Set up TNSNAMES by using oracle 8i Net8 easy configuration from your **Start > Programs >Oracle Windows NT**.
   b. Launch Discoverer Admin Edition by selecting **Start > Programs > Oracle Discoverer 3.1> Administration Edition**.
3. Install the Web Discoverer Server from your Discoverer 3i CD. Follow the installation guide *Discoverer 3i Installation & Administration Guide Release 3.3 for the Web* (A66104-02).
4. Make sure your Web server and browser are both supported by Oracle.

   Oracle supported HTTP servers are:

   - Oracle Application Server
   - Netscape Enterprise Server
   - Apache Server
   - MS Internet Information Server

   Oracle Web Discoverer supported web browsers are:

   - IE 3.x with JInitiator
   - IE 4.01 (4.72.3110.8 in the About box) and higher.
   - IE 5.0
   - Netscape 3.0, 4.0X with Jinitiator 1.1.7
5. Make sure that the Locator (where your http server runs), Session, and Preferences components (where Oracle Web Discoverer server runs) must all be installed on the same subnet. You can ping them to get their IP address.
6. Make sure that the applet and HTML are accessible to the web server. Set up aliases in your web server configuration file if necessary. Test it by launching Oracle Web Discoverer welcome page provided in the documentation. If you

cannot launch the welcome page, your Oracle Web Discoverer installation has problems. Go back to your documentation and make sure you have followed the steps.

7. Make sure that the following parameters have been set up correctly in your preferences file (`pref.txt`) and apply the file:
   - Machine Ips = "web server machine IP address or name"
   - ShowUserTypeChoice 1
   - DefaultUserTypeIsApps 1
   - AppsGWYUID "APPLSYSPUB/PUB"
   - AppsFNDNUM "APPS"
8. Create the End User Layer (EUL) and import EUL Export File (EEX) and Workbooks according to the steps outlined in the *BIS11i Implementation Guide* (A77481-02).
9. Verify your work:
   a. Launch your Discoverer Admin edition
   b. Open the business area Market Online.
   c. Open up Market Online to see its folders.
   d. Make sure you grant the right privileges and responsibilities to your business area.
   e. Make sure that you use the right EEX for importing. Oracle Marketing Online business area is in `biseul.eex`.
   f. Do not forget to refresh the business areas, the last step in the guide.
   g. When creating the EUL, you must run a list of database GRANTs required by the EUL owner according to the documentation. Please make sure the following grants are run:
      * grant select on FND_APPLICATION to eul_us;
      * grant select on FND_RESPONSIBILITY_VL to eul_us;
      * grant select on FND_ORACLE_USERID to eul_us;
      * grant select on FND_DATA_GROUP_UNITS to eul_us;
      * grant select on FND_USER_RESP_GROUPS to eul_us;
      * grant select on FND_USER to eul_us;

- grant select on FND_PRODUCT_INSTALLATIONS to eul_us;
- **grant execute on FND_CLIENT_INFO to eul_us;**
- **grant select on FND_SECURITY_GROUPS_VL to eul_us;**

The last two grants (highlighted in bold) are missing from the documentation. You must run these two grants or you will not be able to see Marketing Online Business Area folders.

10. Make sure that your tnsname is set up with the correct service name. (You will receive an "could not find service name" error if this is not set correctly.) To set the tnsname:

    a. Run Oracle 8 easy configuration.

    b. To verify, run SqlPlus to see whether you can connect to the database.

11. Create a directory. For example: `C:\mydisco`

12. Create a sub-directory named `secure` under it. For example: `C:\mydisco\secure`

13. In the secure directory, create a dbc file. A typical dbc file looks like:

```
TWO_TASK=<database name, ex: OMDB>
GWYUID=APPLSYSPUB/PUB
GUEST_USER_PWD=<An account on Oracle application, you can create one
with none responsibilities, ex: guest/guest>
FNDNAM=apps
APPS_Jdbc_DRIVER_TYPE=THIN
DB_HOST=<database host name, ex: ap030sun.us.oracle.com >
DB_PORT=<database port, ex: 1521>
```

14. For internal, you can go to unix $FND_TOP/secure directory to find a dbc template. For dbc document, refer to Appendix part in the *Oracle Applications System Administrator's Guide (*A75396-02). Without setting this correctly, you will receive a "no dbc file found" error later on.

15. After creating dbc file, set up FND_TOP environment to where your dbc file sits (For example: `C:\mydisco`).

    a. If you are running on Microsoft NT, then set this environment in **Start > Settings > Control Panel > System**. Make sure that you set up a system variable instead of a user variable. Reboot.

    b. If you are using the Unix operating system, then set up using the `setenv` command.

16. Make sure that the following ARU # 311532, 313216 have been applied to your system. The latest OMO ARU (1383055) has these ARUs in it.
17. Make sure the Form Function AMS_LAUNCH_DISCO is created in the Oracle applications instance that will use Discoverer. To check:
    a. Log on as PHP. For example: VISION\VISION98 on DOM1151.
    b. Choose the APPLICATION DEVELOPER responsibility, choose **Application > Function**
    c. Query Function Name AMS_LAUNCH_DISCO for details.
    d. If Form Function AMS_LAUNCH_DISCO is not set up, you can set it up by following instructions described in the following URL: http://www-apps.us.oracle.com/bis/development/discoverer/index.htm

       Use the navigation tree at left to navigate to **Configuration > SSWA Integration > Form Function**
18. Set the following ICX profiles in Oracle Applications:

ICX _PROFILE:	ICX_DISCOVERER_LAUNCHER
Description:	URL that points to the Web Discoverer Server
Example:	`http://ap152wgs.us.oracle.com/webdis/html/english/welcome.htm?Connect=[APPS_SECURE]`

ICX_PROFILE:	ICX_DEFAULT_EUL
Description:	This in combination with the language code make up the EUL owner at run time.
Example:	EUL (not EUL_US)

19. The Oracle Applications APPS_WEB_AGENT profile must be setup and valid. Go to Oracle Application to verify.
20. Make sure that The EUL_TRIGGER$POST_SAVE_DOCUMENT function be registered and valid. This will ensure that work book SQL will be saved to the AMS_DISCOVERER_SQL table:
    a. Navigate to Discoverer Admin edition.
    b. Select **Tools > Register PL/SQL functions**.

c. Register this function according as follows, either by using the import buttons or by manually typing them in. Make sure you enter these parameters in order:

```
Name: EUL_TRIGGER$POST_SAVE_DOCUMENT
Display Name: eul_trigger$post_save_document  (lower case)
Owner: APPS
Package: AMS_DISCOVERERSQL_PVT
Database Link: <Default Database>
Return Type: Number
Check "Available in User Edition" check box
```

For the Arguments tab

```
P_WORKBOOKOWNER
P_WORKBOOKNAME
P_WORKSHEETNAME
P_SEQUENCE
P_SQLSEGMENT
```

All data types are varchar except for P_SEQUENCE which has a data type of Number.

d. All of the arguments are required, so select the **Required** check box.

e. Click **Validate** to validate the function you just registered.

f. Exit Discoverer Admin Edition and User Edition (if you have them running) to make sure the changes are committed.

21. Create Workbooks:

a. Launch Discoverer in one of two ways:

- Using Discoverer User Edition (client/server version)
- By clicking the hyperlink in the Oracle Marketing Online GUI

b. After you launch Oracle Web Discoverer, select Creating Workbooks and pick the Oracle Marketing Online Business area.

You will see a list of folders in this business area. Select the folder of your choice, click + to expand it.

c. Each folder has one mandatory identifier item and one "Include XXX details" item (usually these are the first two items in your tree). **You must select these two items for your workbook.** You can but need not select the rest of the items.

d. Use the wizard to specify your conditions. You can see your selections by executing the workbook.

22. Save the Workbooks into the database (not your computer). This create the SQL statement of your newly created workbook and store that into a database table.
23. If you do not see a list of workbooks from Oracle Marketing Online workbook LOV window and you do see a list of workbooks stored in your database, then your registered function is not setup correctly. You can check the function using Oracle Web Discoverer Administration Edition or you can also log in with SqlPlus to check whether there are any rows in the AMS_DISCOVERER_SQL table.
24. If you wish to share your Workbook with other users, then:

    a. In Oracle Web Discoverer, choose **File > Manage Workbooks > Sharing**.

    b. In **Workbook > User** tab, select the workbook you want to share.

    c. Select the users you want to share the workbook and add these users to the shared area.

    d. Click **OK**.

Setting Up News and Stocks for the Home Tab

Use this procedure to set up the stocks and news feeds for users' home tabs.

Prerequisites

The table AMV_STOCKS must contain data.

You must obtain a license from OneSource. Navigate to www.onesource.com for more information.

Steps

1. Run the KeyDaemon. Allow for 3-10 hours depending on how many stock key IDs you would like it to retrieve.

   If you do not plan on updating the AMV_STOCKS table regularly, you don't need to leave the KeyDaemon running after the initial 3-10 hours. Its only purpose is to fetch key ids for companies whose stock symbols are in AMV_STOCKS, but do not have key ids assigned to them yet. This will only occur after the initial run if you are updating the AMV_STOCKS table.

2. Run the NewsDaemon. There are two kinds of updates that the NewsDaemon can perform:

   - **A User Update:** This update only fetches news for companies that are specified in specific user's profiles. This kind of update can be performed at a minimum of once per hour.
   - **A Global Update**: This update fetch news for all the companies that have key ids in the database. This kind of update can be performed at a minimum of once per week. These limitations are set due to server-load restrictions on the content provider's side. The update-interval for either type of update may be increased without limit. The NewsDaemon may be started with either type of update.

   If a user adds a company to their profile, the news for that company will only show up immediately if three conditions are met:

   - The company symbol exists in AMV_STOCKS
   - The KeyDaemon has already retrieved the content-provider key for that company
   - Another user already had that company in their profile before the last user update or a global update has been done at least once.

Java Class Usage for KeyDaemon and NewsDaemon

Following is a list of the arguments and their meanings for the KeyDaemon and the NewsDaemon

KeyDaemon

Purpose:	Specify the database host, port, alias, and log-in information.
Syntax:	`-d <db connect string> <user or schema> <password>`
Example(s):	`-d jdbc:oracle:thin:@ap012sun:1521:reldev1 apps apps`
Required:	Yes
Default	N/A

Purpose:	Specify the content provider code.
Syntax:	`-v <vendor code 1>[, vendor code 2,...]`

Example(s):	`-v ONE_SOURCE,HOOVERS, -v ONE_SOURCE (*currently only this vendor code is available)`
Required:	Yes
Default:	N/A

Purpose	Specify the interval to sleep between updates in hours minutes, seconds and milliseconds.
Syntax:	`-u <HH:MM:SS:mm>`
Example(s):	`-u 01:00:00:00` (once every hour)
Required:	No
Default:	24:00:00:00 (once every day)

Purpose:	Specify a file to log errors to.
Syntax:	`-f <logfile path>`
Example(s):	`-f /home/rjainend/keyd.log`
Required:	No
Default:	None

Purpose:	Specify a network proxy host and port.
Syntax:	`-p <proxy hostname> <proxy port>`
Example(s):	`-p www-proxy.us.oracle.com 80`
Required:	Required only for organizations behind a fire wall.
Default:	None

Purpose:	View the usage text.
Syntax:	`-h`

Purpose:	Write messages to standard output.

Syntax:	`-verbose`

Purpose:	Write debugging info to standard output.
Syntax:	`-debug`

Sample Usage

```
java oracle.apps.amv.news.KeyDaemon -d
jdbc:oracle:thin:@ap012sun:1521:reldev1 apps apps -v ONE_
SOURCE -u 4:00:00:00 -f keyd.log -p www-proxy.us.oracle.com 80
-verbose
```

Daemon News Usage

Purpose:	Specify the database host, port, alias, and log-in information.
Syntax:	`-d <db connect string> <user or schema> <password>`
Example:	`-d jdbc:oracle:thin:@ap012sun:1521:reldev1 apps apps`
Required?	Yes
Default:	N/A

Purpose:	Specify the content provider code.
Syntax:	`-v <vendor code 1>[, vendor code 2,...]`
Examples:	-v ONE_SOURCE,HOOVERS -v ONE_SOURCE (*currently only this vendor code is available)
Required?	Yes
Default:	N/A

Purpose:	Specify the interval to sleep between User Updates in hours, minutes, seconds and milliseconds.
Syntax:	`-su <HH:MM:SS:mm>`

Example:	-su 1:00:00:00 (once every hour)
Required?	No
Default:	1:00:00:00 (once every hour)

Purpose:	Specify the interval to sleep between Global Updates in hours, minutes, seconds and milliseconds.
Syntax:	-lu <HH:MM:SS:mm>
Example:	-lu 168:00:00:00 (once every week)
Required?	No
Default:	168:00:00:00 (once every week)

Purpose:	Specify the number of news items to fetch for each company during a User Update.
Syntax:	-sn <number of news items>
Example:	-sn 20
Required?	No
Default:	20 (This is also the maximum number of news items allowed for a User Update)

Purpose:	Specify the number of news items to fetch for each company during a Global Update.
Syntax:	-ln <number of news items>
Example:	-ln 10
Required?	No
Default:	10 (This is also the maximum number of news items allowed for a Global Update)

Purpose:	Specify a file to log errors to.
Syntax:	-f <logfile path>
Example:	-f /home/rjainend/newsd.log

Required?	No
Default:	None

Purpose:	Specify a network proxy host and port.
Syntax:	`-p <proxy hostname> <proxy port>`
Example:	`-p www-proxy.us.oracle.com 80`
Required?	No. Only necessary for an organization behind a fire wall.
Default:	None

Purpose:	Start the NewsDaemon in User Update mode. If this argument is not specified, the NewsDaemon starts in Global Update mode.
Syntax:	`-short`

Purpose:	View the usage text.
Syntax:	`-h`

Purpose:	Write messages to standard output.
Syntax:	`-verbose`

Purpose:	Write debugging info to standard output.
Syntax:	`-debug`

Sample Usage

```
java oracle.apps.amv.news.NewsDaemon -d
jdbc:oracle:thin:@ap012sun:1521:reldev1 apps apps -v ONE_
SOURCE -su 4:00:00:00 -sn 5 -lu 200:00:00:00 -ln 5 -f keyd.log
-p www-proxy.us.oracle.com 80 -verbose -short
```

Known Problems with Oracle Web Discoverer

- Current release does not work if cookies are disabled.
- If you do a refresh of the database, then the applications user password must be reset before users can log into Oracle Web Discoverer again.
- Errors with text such as: "Failed to connect to database - Unable to connect to Oracle Applications database (asfcpgcs)"

  This occurs when you click on the Oracle Web Discoverer icon, bring up the Discoverer applet, but it fails to connect to the applications database.

  Cause: Discoverer dbc file in the secure directory is not set up correctly. or the TNSNAME is not set up right in Discoverer server.
- Errors such as "Wide Area Network Connection failed." often mean that you need to bounce the server.
- If you have accessed another version of Oracle Web Discoverer before, then your browser cache may have the latest version of Discoverer objects. If you access a lower version of Oracle Web Discoverer, then you will get the wide area network connection error in Internet Explorer.

  For example:

  > "Unable to connect to the Oracle Discoverer Application Server: -Wide area network connection failed. Locator interface incorrect. Expecting version 3.3.3 got version 3.3.2."

  To resolve this in Internet Explorer:

  1. Navigate to **Tools > Internet Options > Settings >View Objects.**
  2. Delete the Oracle Discoverer 3i and Oracle Discoverer 3i Initializer entries.
  3. Exit all Internet Explorer browser windows and reconnect to the Oracle Marketing Online site.

Seeded Workflows

Application System	Workflow	File Name
AMS	Continuous Campaign	amsccamp.wft
	Marketing Approvals	amsvappr.wft
OZF	Fund Request Approvals	ozfvwreq.wft

Administering Oracle Marketing Online

Enabling Campaign and Event Approval Workflow

Use this procedure to enable the Workflow approval process for campaign themes and budgets. You must enable the Workflow for each campaign and event setup separately.

Prerequisites

You must create campaign setups first.

Steps

1. Navigate to **Admin > General > Custom Setup.**
2. Click on the name of the setup you wish to enable**.**

   The Custom Setup subtab appears.
3. If you wish to enable campaign theme approval using the default Oracle Marketing Online Workflow, then select the **Show** check box for Theme Approval. This is one of the last items on the list.
4. If you wish to enable campaign budget approval using the default Oracle Marketing Online Workflow, then select the **Show** check box for Budget Approval. This is one of the last items on the list.
5. Click **Update**.

Setting Up Marketing Mediums for Campaigns

Use this procedure to create or edit marketing mediums you use to execute the marketing activities for your company. A marketing medium can be a magazine or a television station you advertise in, an email server that sends out email promotions, or a telemarketing center. A marketing medium can have only one marketing activity associated with it at one time.

Prerequisites

Optional entry in Preferred Vendor, Party, and Managed By fields requires setup in Oracle financial applications.

Steps

1. Navigate to **Admin > General > Marketing Medium.**
2. If you are creating a new entry, then click **Create**. Otherwise select the name of the marketing medium you wish to edit.

   The Create Marketing Medium or Marketing Medium Detail subtab appears.
3. Enter or edit the name for the marketing medium.
4. Optionally, enter the other fields. The list of values for Preferred Vendor, Party, and Managed by come from ERP setups.
5. If you have not yet set up activities, then leave the Activity field blank. You can associate marketing mediums to activities while creating activities.
6. Click **Create** or **Update.**

   You are now ready to set up activities.

Guidelines

The optional fields include:

Field Name	Description
Preferred Vendor	Company name set up in Oracle Accounts Payable
Managed By	Individual name set up in Oracle Human Resources
Party	Party from the Oracle Customer Model
Active From and Active To	Dates this marketing medium can be used
Internal, Outbound, and Inbound check boxes	Specifies which type of campaigns the marketing medium can be used for
Activity	Lets you assign a marketing medium to an activity. If you have not yet created your activities, then leave this field blank. Instead, do the assignment while creating your activities.
Description	Free text description

Setting Up or Editing Activities for Campaigns and Events

Use this procedure to set up the activities for your campaigns and events. Each activity must be associated with one or more marketing mediums through which it is carried out.

For example, if you are running print ads in two newspapers, the Wall Street Journal and the Washington Post, and broadcasting a spot on one television station, then you may want to create two separate activities, one named "Print Advertising" and another named "Television Advertising". You associate the Print Advertising activity with two marketing mediums: The Wall Street Journal and the Washington Post. You associate the Television Advertising activity with the television marketing medium.

Prerequisites

You must set up marketing mediums before you can complete this procedure.

Steps

1. Navigate to **Admin > General > Activity**
2. If you are creating a new activity, then click **Create.**
3. If you are editing an existing activity, then select the name of the activity you wish to edit.

   The Create Activity or Activity Details subtab appears, depending on whether you are creating or editing the activity.
4. Enter or modify the name of the activity. This activity name appears in the Activity drop-down list in campaigns and events.
5. Use the Activity Type list of values (LOV) to select an activity type for this activity. The activity appears in the Activity list of values, when users select this activity type only.
6. Select the **Active** check box.
7. Enter a description.
8. In the Marketing Mediums region, enter one or more media that can be used for this activity:
   a. Use the Name drop-down list to select the marketing medium.
   b. In Active From and Active To fields enter the date range for this activity. The dates must fall between the effective dates for the marketing medium you have chosen.
9. Click **Create** or **Update.**

Guidelines

The optional fields include:

Field Name	Description
Active, Response check boxes	Lets you classify if an Activity is related to outbound or inbound marketing activities.
Description	Free text.
Marketing Medium Name	List of values with the marketing mediums you have set up previously.

Creating Custom Setups for Campaigns and Events

Use this procedure to create custom setups that customize what information users must enter for campaigns and events. A custom setup specifies:

- Which check-list attributes appear during campaign and event creation
- Which of these must be filled in by users before they can make a campaign or an event active
- The order in which the attributes are listed in the check list

When users create campaigns and events, they select one of the custom setups you create using the Setup Type drop-down list.

Prerequisites

Before you carry out this procedure, you must set up:

- Marketing mediums
- Activities

Steps

1. Navigate to **Admin > General> Custom Setup.**
2. Click **Create.**

   The Create Custom Setup subtab appears.
3. In Setup Name, enter a name for this custom setup. This is the name that appears in the Setup Type drop-down list during campaign and event creation and above the list of check-list attributes.

4. From the Associated With drop-down list, select whether you want to use this template for execution campaigns, rollup campaigns, execution events, or rollup events.
5. Use the Activity Type drop-down list to select an activity where this custom setup will appear.
6. If you wish to limit the use of this custom setup further, then select an activity for the activity type. If you do not select an activity type, then this custom setup can be used for all activities for the activity type.
7. In the Components region, select the **Show** check box for attributes you wish to appear on the check list for the campaign or event using this custom setup.
8. If you wish to make any of the attributes mandatory for a campaign, then select the **Mandatory** check box next to each attribute. If a user does not make an entry in a mandatory attribute of a campaign, then the campaign cannot be used.

> **Note:** Making a check-list attribute mandatory requires users to make an entry in the attribute but does not require them to fill in all the information requested. Any entry satisfies the requirement and marks the attribute with a check mark.

9. If you wish to modify the order in which the attributes appear on the check list then modify the numbering in the Sequence field.
10. If you wish to enable campaign theme approval using the default Oracle Marketing Online Workflow, then select the **Show** check box for Theme Approval.
11. If you wish to enable campaign budget approval using the default Oracle Marketing Online Workflow, then select the **Show** check box for Budget Approval.
12. Click **Create.**

Guidelines

The optional fields include:

Field Name	Description
Active check box	Deselecting this check box removes this template from use.
Source Code Suffix	Enter a suffix for the source code that is generated automatically whenever an agent creates a campaign. This source code becomes the primary reference to the campaign and is referred to by the Oracle Telesales and Oracle Order Capture applications. It can be used to track the effectiveness of a campaign through consumer activity. When a campaign is defined, a source code may be manually entered by the user, or generated by the system automatically.
Marketing Medium Name	LOV of Marketing Mediums you have set up previously.

Creating Metrics

Use this procedure to set up all metrics. This includes cost metrics as well as those metrics used to track the performance of your campaigns, events, and deliverables.

Prerequisites

None

Steps

1. Navigate to **Admin > General > Metrics.**
2. If you wish to create a new metric, then click **Create**.
3. If you wish to edit an existing metric, then select the metric to edit from the list.

   The Metrics Definition subtab appears.
4. Enter the metric name.
5. Optionally, select the metric category and subcategory.
6. From the Used With drop-down list, select what object uses this metric.
7. Enter an optional description.
8. In the Calculation region, select the radio button that describes how this metric is getting its values:

- If users are entering values in this metric, then select the **Enter Value Manually**.
- If this metric is getting its values from another metric then select **Accrue through summarization**. Use this selection both for metrics that summarize other metrics at the same level in the campaign or event hierarchy and those that summarize values from levels down the campaign or event hierarchy.
- If the metric is to get its value using an external program, then select the **Calculate using Program** and enter the path in the text box provided.
- If you wish the metric to be calculated using another metric, select **Calculate using Metric**, click **Go** and use the list of values (LOV) to enter the metric.

9. In the Summarize to region, enter information about where the metric is passing its values. Select one of the three radio buttons:
   - If the metric is not passing its value to another metric, then select **None**.
   - If the metric is passing its value to a metric in a parent rollup campaign or parent rollup event, then select **of the Parent,** click **Go,** and use the list of values (LOV) to enter the metric. The destination metric must be of type **Accrue through summarization**.
   - If this metric is sending its values to another metric at the same level in the campaign or event hierarchy, then select **at same level,** click **Go**, and use the LOV to enter the name of the metric to which you are passing data.
10. Click **Update**.

Creating Venues

Venues describe the physical location where an event is being held. Use this procedure to set up venues for your events.

Prerequisites

None

Steps

1. Navigate to **Admin > General > Venue**
2. Click **Create**.

The Create Venue subtab appears.

3. Enter the venue name, venue type, and other appropriate information about the venue.
4. Select the **Active** check box.
5. Click **Create**.

Guidelines

Make sure to use a unique name to identify a venue. For example, the name Hyatt Regency covers hotels in many locations. Use Hyatt Regency San Francisco instead