Oracle® Marketing Online

Implementation Guide

Release 11*i*

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Oracle Marketing Online Implementation Guide, Release 11*i*

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Send Us Your Comments

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Part No. A97215-01

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us via the postal service.

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If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Introduction

This implementation guide provides information and instructions to help you implement the marketing family of Oracle eBusiness Suite applications, Release 11*i*.

This includes

- Oracle Marketing Online
- Oracle Marketing Intelligence

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

Intended Audience

This guide is to be used by experienced system administrators and Oracle implementation consultants who understand Oracle CRM (Customer Relationship Management) and ERP (Enterprise Resource Planning) applications. You must have an understanding of Oracle CRM and ERP applications before proceeding.

How This Guide is Organized

The first two chapters are an introduction to Oracle Marketing Online and its technology requirements. The third chapter consists of an overview of the entire implementation process. The fourth and fifth chapters cover the basic implementation and the implementation of specific business functions. These are followed by chapters on administration settings, user setups and post implementation steps.

Following the chapters of this guide are a number of appendices summarizing the options and settings used in the guide as well as useful reference information.

This guide is optimized for online viewing as related topics and steps are hyperlinked for convenience. It is best viewed in PDF or HTML formats.

How to Use This Guide

This Guide is designed as a start to finish set of steps for implementing Oracle Marketing Online. Please read the Implementation Overview chapter to familiarize yourself with general concepts that will be used throughout the Guide. Follow the steps for Basic Implementation in general and then proceed to the steps for Business Function Implementation. Additional information is contained in Administration Setups, User Setup, and Post Implementation chapters.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at `http://www.oracle.com/accessibility/`.

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Which Steps are Required and Which are Optional

The summary table at the beginning of each section of this Guide lists the steps to be taken in that section. This table indicates whether a particular step is required or optional. Oracle recommends the implementation of the required products and modules of the CRM eBusiness suite to ensure the full functionality of your product. However, you may omit steps in the Business Function Implementation if you do not need to implement a particular functionality at your site or are configuring your product to work with third party products.

Related Documentation and Resources

The following documents provide additional information on installing and implementing Oracle CRM products.

Installing Oracle Applications, Release 11i

This manual documents the Rapid Install installation process.

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*.

Oracle Applications Flexfield Guide

This guide contains information about using Oracle Flexfield features. It also offers flexfield implementation suggestions.

Oracle Applications Product Update Notes, Release 11i

This document contains information about new product features and functions for various Oracle applications.

Oracle Applications System Administrator's Guide

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.

Oracle Applications User's Guide

This guide explains how to customize lists of values (LOVs) in the system, enter data, and introduces other basic features of the GUI available with Oracle Applications Release 11*i*.

Additional Product-Related Documentation

Implementing CRM Applications

This document provides instructions for completing installation of Oracle Customer Relationship Management (CRM) products.

Implementing Oracle HRMS

This document provides the information necessary to implement Oracle HRMS.

Oracle CRM Foundation Implementation Guide

This guide describes set up and configuration tasks for all the foundation components.

Oracle CRM Foundation Technical Reference Manual

This manual contains table and view descriptions for all the Oracle CRM foundation components.

Oracle Inventory and User's Guides

These guides contain information about product features, functions, and implementation for Oracle Inventory.

Oracle Sales Online Concepts and Procedures

This document is a printed compilation of the Oracle Sales online help system. It may be helpful in setting up and using the Customer and Partner subtabs of the Audience tab.

Oracle Marketing Encyclopedia Concepts and Procedures

This document is a printed compilation of the Oracle Marketing Encyclopedia online help system.

Oracle Advanced Pricing Implementation and User's Guides

These guides provide information about product features, functions, and implementation for Oracle Advanced Pricing.

Oracle Advanced Outbound Concepts and Procedures Guide

This guide describes the use of Oracle Advanced Outbound for telemarketing campaign schedules.

Oracle One to One Fulfillment Concepts and Procedures Guide

This guide describes the user of Oracle One to One Fulfillment for email direct marketing campaign schedules.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Marketing Online and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Marketing Online working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracl*eMetaLink*

Oracl*eMetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracl*eMetaLin*k, you can obtain information and advice from Top Tech Documents and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracl*eMetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Top Tech Documents/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Top Tech Documents/ERP Applications/Applications Installation and Upgrade.

1 Technology Requirements, Dependencies, and Integration Points

The implementation of Oracle Marketing Online requires certain technologies to be implemented. This chapter lists those technology requirements, required and optional dependencies.

Note: For Technological Requirements that overlap with Technological Requirements specified in the Oracle Applications Installation Guide, the Oracle Applications Installation Guide shall take precedence.

1.1 Technology Requirements

The following table lists the technology requirements for Oracle Marketing Online.

Technology
Oracle 8 Enterprise Edition Release, version 8.1.7.2
Oracle WebDB, version 2.2.2.1
Apache, version 1.3.9
Java Developer Kit Server Side, version 1.2
WorkFlow, version 2.6
Oracle Discoverer, version 4.1.38.16
Oracle Database Server, version 9.0.1.1 (required for Data Mining)
Oracle9i Data Mining, version 9.0.1 (required for Data Mining)

Technology
InterMedia, version 8.1.6
JInitiator, version 1.1.8.13
BI Beans, version 1.6.0.36
MS Internet Explorer, version 5.5 or later This is the recommended browser for all HTML-based applications.

1.2 Required Dependencies

The following table lists the dependencies for the Oracle marketing family of eBusiness Suite applications. Application A, Oracle Marketing Online, is said to be dependent on application or module B, if A will not operate properly without the implementation of B.

CRM foundation modules must be implemented in full. Any dependent applications must be set up in full if you have purchased a license for that application. If you have not purchased a license, then you need only to set the application up to the extent allowed by the shared license which comes free of charge with Oracle Marketing Online.

Application or Module
Human Resources (HRMS)
CRM Foundation Resource Manager
CRM Foundation Task Manager
CRM Foundation Notes
CRM Foundation Tasks
General Ledger
One to One Fulfillment
Advanced Pricing
Oracle Inventory

1.3 Conditional Dependencies, required for Trade Management

The following table lists the dependencies for the Oracle Trade Management. Application A is said to be dependent on application or module B, if A will not run without the implementation of B.

CRM foundation modules must be implemented. Any dependent applications must be set up in full if you have purchased a license for that application. If you have not purchased a license, then you need only to set the application up to the extent allowed by the shared license which comes free of charge with Oracle Marketing Online.

Application or Module
Accounts Receivable
Accounts Payable
Oracle Territory Manager
Oracle Order Management

1.4 Integration Points

The following table shows the integration points for Oracle marketing applications. Application A is said to be integrated with application B if non-critical features of A will not work without the implementation of B.

Application or Module
Accounts Payable
Accounts Receivable
Advanced Pricing
General Ledger
Human Resources
Inventory
*i*Store
Marketing Encyclopedia
Partners Online
Scripting

Application or Module
Interaction History
CRM Foundation Territory Manager
Call Center/Advanced Outbound
Install Base

2

Introduction

2.1 Oracle Marketing Online 11i Release 7

Oracle Marketing Online enables an enterprise to achieve Single Marketing Reality the ability to plan and execute marketing programs from campaign to order to cash. Oracle Marketing Online also leverages Single Customer Reality, Oracle's exclusive Trading Community Architecture (TCA) that stores all customer, partner, prospect and other related information in a single repository, to deliver consistent messages and offers across all channels. In short, Oracle Marketing Online takes you beyond simple campaign planning and execution; it empowers you to measure and achieve true marketing ROI.

Oracle Marketing Online is a part of the Oracle eBusiness Suite, an integrated suite of applications for the enterprise, including both ERP and CRM. The Oracle eBusiness Suite is designed to transform traditional businesses into e-businesses.

2.2 Key Benefits

As a key application of the Oracle eBusiness Suite, Oracle Marketing Online offers the following benefits:

- Automate processes – By providing centralized processes and approval management, Oracle Marketing Online enables an organization to focus more on marketing and less on logistics.
- Enable multi-channel execution – Via seamless integration with other Oracle CRM products, a marketer can use Oracle Marketing Online to plan and execute campaigns across all channels and marketing media.
- Increase velocity – Oracle Marketing Online increases personal productivity while facilitating team collaboration and information sharing. Marketers can

plan and execute campaigns in an accelerated time frame to gain a first mover advantage.

- Become a profit center – Because campaigns and offers are tracked across the E-Business Suite, Oracle Marketing Online enables marketers to pinpoint the revenue generated by each marketing effort.
- Maximize ROI – Since costs and revenue can be tracked on a real-time basis, marketers can tweak or even stop a campaign in midcourse to maximize the marketing ROI.

2.2.1 New in this release

Analytics

- Out-of-the-Box Performance Metrics
- Home Page Analytical Reports

Segmentation and List Management

- List Import
- List Export
- Suppression Filters
- Manually Added Employee List
- Discoverer Business Areas
- Control Group vs. Contact Group
- List and Segment Selection Criteria
- Segment Hierarchy

Budget and Costs Management

- Budget Categories
- Budget Allocation
- Budget Threshold
- Checkbook

Product Creation and Maintenance

- Inventory Attributes
- Inventory Category Support
- Product Revision History

- Product Collateral

Pricing and Offer Management

- Pricing for Product Category
- Comprehensive Promotional Offer Types
- Standalone Offers and Offer Reuse
- Postings to Budget Checkbook and GL

Campaign Planning

- Programs
- Trackable PIN Code
- Campaign/Event Association
- Triggers

Event Planning and Management

- Event Registration

Multi-Channel Execution

- Email Content Composition
- Email Mail Merge
- Email Preview and Testing
- Outbound Telemarketing Execution
- Universal and Rule-Based Web Postings
- Web Recommendation Prioritization
- Web Placement Management
- Extensible Web Posting Framework

Usability Features

- Approval Rules
- Mandatory Fields
- Country Filter
- Personalized Views
- Summary Data Export
- Application Tip Text
- Confirmation Messages
- Advanced Search

- Workflow Management
- Locking Rules
- Function Level Security

2.3 Analytics

Oracle Marketing Online empowers marketers and managers to measure and evaluate marketing activities based on a 360-degree view of all customer interactions. This robust customer knowledge can be leveraged to calculate true marketing ROI.

2.3.1 New – Out-of-the-Box Performance Metrics

Oracle Marketing Online 11iR7 provides out-of-the-box calculations for key measures of campaign and event performance. These scalable calculations enable marketers to evaluate critical marketing performance indicators without any setup customizations. The performance metrics calculations for 11iR7 include the following

- Leads, Opportunities, and Orders
- Event Registrants, Attendees, and Cancellations
- Budget Commitments and Utilization

2.3.2 New – Home Page Analytical Reports

In addition to the enhanced metrics, the configurable “Reporting Bins” on the 11iR7 Home Page enable users to quickly view the knowledge they need to perform their jobs. The Reporting Bins contain summary information for key marketing activities, including Budget Utilization and Campaign and Event Effectiveness. Each Bin provides links to drill down to more granular details.

The Home Page also provides a Chart Area for graphical display of performance data, such as Top Campaigns by Leads, and a Report Area for additional analytical information. All of the new Home Page display options are customizable at the individual user level.

2.4 Segmentation & List Management

Oracle Marketing Online supports sophisticated list management to import, generate, compile, and profile customer and prospect data. Marketers can quickly generate campaign-specific target lists from multiple data sources based upon user-defined criteria. Oracle Marketing Online enables the creation of simple to complex segmentation strategies. A marketer can use the segment hierarchy to quickly view the segmentation approach, the size of any segment, as well as match any analysis against the various segment branches.

2.4.1 Enhanced – List Import

Oracle Marketing Online offers an enhanced list import process, enabling marketers to map an external data source, such as a purchased or rented list, or existing customer database, to any destination listed below. Out-of-the-box, this capability facilitates the importing of

- Prospects for marketing campaigns
- Leads for following up by Oracle TeleSales
- Customers into TCA (e.g., from an existing legacy customer database)
- Processing event registrants into Oracle Marketing Online's Event module

2.4.2 New – Suppression Filters

Oracle Marketing Online helps companies to comply with privacy policies by providing pre-defined suppression filters. These filters are applied automatically to every target list so that customers who have opted out of receiving promotional campaigns are not targeted. Marketers can also create their own user-defined suppression filters and apply them to all campaigns, campaigns based on activities (for example, email, direct mail, or telemarketing), or only to specific campaigns.

2.4.3 New – Control Group vs. Contact Group

When creating a target list for a campaign, a marketer can designate a control group, people who will not receive any promotional treatment. Their behavior is then compared with that of the contact group to determine if the campaign was effective. For example, for a given campaign that is intended to generate sales of a certain product, what percentage of the control group vs. the target group purchased the product anyway without receiving the promotion? This technique helps marketers to analyze the effectiveness of their campaigns.

2.4.4 Enhanced – List and Segment Selection Criteria

Oracle Marketing Online’s already robust list and segment definition capabilities are enhanced in 11iR7 with the following additional consumer and business profile attributes through Discoverer business areas

- Person age, income, marital status, or household size
- Person interests, languages, citizenship, education, and employment history
- Organization annual revenues, number of employees, or SIC code
- Account information, including Current Balance, Account Activation Date and Account Status
- Order history
- Campaign contact history
- Data mining scores, including Campaign Response Probability

2.4.5 Enhanced – Segment Hierarchy

Using Oracle Marketing Online, marketers have been able to define a one-to-many parent-child hierarchy of customer segments. In Release 7, this feature is enhanced to ensure validation that parent segments are supersets of children segments. Marketers can logically group their customers in user-defined hierarchies and generate a list at any level in the hierarchy for campaign execution.

The application does not segment validations. When a segment has a parent segment, its contents will be the intersection of its original contents and its parent's contents. For example, if segment A is defined as: all people with ages between 20 and 40, and segment B is defined as: all people with ages between 30 and 50; if you assign segment A as parent of segment B, then the segment B will only contain people whose ages are between 30 and 40. The preview button on the segment detail page will show the correct intersected number.

2.5 Budget & Costs Management

Budget and Costs Management enables a marketer to create, allocate, and manage budgets and checkbooks. Oracle Marketing Online supports a hierarchy of parent and child budgets. Funds may be transferred between different budgets. The marketing checkbook tracks actual expenditures as they occur for enhanced cost control.

2.5.1 Enhanced – Budget Categories

Enhanced Budget Management features in Oracle Marketing Online provide marketing and sales organizations with the ability to categorize and control usages of these budgets for specific activities.

2.5.2 Enhanced – Budget Allocation

Budget Allocation enables distribution of sales funds and marketing budgets down the sales territory hierarchy. Using the Holdback feature, a portion of the allocated funds can be reserved for future discretionary allocation.

2.5.3 New – Budget Threshold

The Budget Threshold feature monitors budget usage and provides notifications on over- or under-utilization of budgets. For example, a company can set up a budget threshold to generate a notification to the fund manager if more than a predefined portion of the budget is committed in the first month of the fiscal year.

2.5.4 Enhanced – Checkbook

The budget checkbook is enhanced with drill-down to the details of the budget columns such as Planned, Committed, Utilized, and Paid. By providing a more granular access to information, Oracle Marketing Online enables quick adaptation to changing market conditions. A fund manager can make manual adjustments to the budget checkbook to transfer money from the 'Utilized' to 'Committed' column. This may be necessary if a customer has failed to meet the terms of a contract, or if it is necessary to free up unutilized funds upon completion or cancellation of a campaign.

2.6 Product Creation and Maintenance

Oracle Marketing Online enables you to take products from concept to market in hours and days rather than weeks and months. Products, product bundles, and product relationships can be defined in one single marketing application. Because of E-Business Suite integration, this information is populated in Oracle Inventory automatically. With this strategic capability, you will be able to bring new products and solutions to market faster.

2.6.1 Enhanced – Inventory Attributes

More inventory attributes can be modified with the latest release. Attributes such as customer order enabled, costing enabled, and activation required can be easily changed within Oracle Marketing Online. You will also be able to assign a product to multiple inventory organizations.

2.6.2 New – Inventory Category Support

With inventory item category structure, a user can classify products in a logical fashion for order management purposes. Oracle Marketing Online users can easily assign any product to specific item categories for various purposes.

2.6.3 New – Product Revision History

The user will be able to enter and view the revisions and effective dates of a product, so that each version or revision which the product has gone through can be tracked.

2.6.4 New – Product Collateral

This new feature enables the marketer to associate collateral to a product as a related item.

2.7 Pricing & Offer Management

Pricing Management completes the canonical 4 Ps in marketing – pricing, product, promotion, and placement. With the ability to have control over price lists and discount rules using one single marketing application, Oracle Marketing Online enables users to respond to market conditions rapidly. A marketer can create a price list in Oracle Marketing Online and apply it across ERP and CRM modules. Oracle Marketing Online allows a user to view details of existing price lists in Oracle Pricing, specify products, prices, and other pricing attributes in a price list, and define eligible customer segments for a price list.

2.7.1 New – Pricing for Product Category

In 11iR7 a marketer is able to assign a price category, so that all products in that category have the same price. This feature saves the user from having to enter the same price multiple times.

2.7.2 Enhanced – Comprehensive Promotional Offer Types

Users can create various types of offers which can be applied via all execution channels, such as the Web or call center.

- Off-Invoice – amount, percent or lump -sum discount applied on the face of the invoice
- Accruals and lump-sum – differed discounts paid to the customer based on proof of performance
- Order Value – discounts based on total value of the order
- Terms Upgrade – shipping, freight, and payment upgrades
- Promotional Goods – buy X, Get Y discounts
- Trade Deal – combination of off-invoice and accrual discounts

Oracle Marketing Online also provides the ability to define discounts on multiple products and product categories in a single offer.

2.7.3 New – Standalone Offers and Offer Reuse

Marketing users can create standalone offers without creating a supporting campaign. Multiple campaigns can promote a single offer through various channels at different times.

2.7.4 New – Postings to Budget Checkbook and GL

The appropriate budget checkbook is updated with offer utilization information based on the customer and the products sold. For accrual (differed) discounts, Oracle Marketing Online also updates the appropriate General Ledger liability accounts.

2.8 Campaign Planning

Campaign management facilitates planning, budgeting, and approvals, thereby automating marketing processes so that marketers can focus more on marketing and less on administrative tasks.

2.8.1 New – Programs

Oracle Marketing Online introduces marketing programs as parent folders into which a user can group campaigns and events. By having this flexible hierarchy, costs and metrics can be rolled up into the parent program.

2.8.2 Enhanced – Trackable PIN Code

For each entry in a list Oracle Marketing Online employs a unique Personal Identification Number (PIN) code that allows for precise tracking of each targeted individual in a campaign. This PIN code can be used by inbound channels to quickly access customer information and campaign details. When creating a mailing, a marketer can include the PIN code as a merge field to automatically embed the customer's information within the body of the message.

2.8.3 Enhanced – Campaign/Event Association

One-off events may be created from within campaigns to create a parent child relationship. One-off events are single location events most often associated with a campaign. All the costs and metrics of this event will roll up to the campaign. Alternatively, an event may be related to a campaign for promotional purposes. The costs and metrics of this event will not roll up to the campaign.

2.8.4 Enhanced – Triggers

Marketers can automate campaign execution by designating trigger conditions under which a campaign schedule executes. For example, a direct mailing is automatically followed up by a phone call when the response rate is greater than 50%. The campaign schedule details such as target lists and email content are set up in advance. When the trigger condition is met, the target list is automatically generated and the campaign schedule executes. Triggers can be reused across multiple schedules.

2.9 Event Planning and Management

Oracle Marketing Online Event Management includes the key functions to establish marketing and sales events, either as part of a marketing campaign or as a revenue generating promotion. Marketers and event coordinators can create events with budgets, allocate resources such as equipment and collateral, and manage tasks required for planning and executing the events.

2.9.1 Enhanced – Event Registration

Event details and registration information are shared with Oracle TeleSales to facilitate easy registration and payment. In 11iR7, event registration is enhanced to handle registration in Oracle Marketing Online, enabling sales people, marketers, and other internal staff to register individuals for events.

2.10 Multi-Channel Execution

Oracle Marketing Online enables integration across all execution channels to provide a consistent campaign message at every customer touch point. Each channel conveys the appropriate message and offer while providing real-time feedback on customer response for analysis and future actions.

2.10.1 Enhanced – Email Content Composition

With the latest release, a marketer no longer needs complex setup or a separate HTML editor to create compelling email content and then use the application to execute. Email content is managed as a deliverable, like any other content pieces. Both HTML and ASCII text formats are supported.

2.10.2 Enhanced – Email Mail Merge

Using pre-defined mail merge tags, a marketer can insert various customer fields into an email with a user-friendly interface within Oracle Marketing Online.

2.10.3 New – Email Preview and Testing

Right before executing an email, the user has the option to preview an email and send a test email for validation. Oracle Marketing Online now enables an average marketing user to create, mail merge, preview, test, and execute a complete email campaign within Oracle Marketing Online.

2.10.4 Enhanced – Outbound Telemarketing Execution

With enhanced integration with Oracle Advanced Outbound, a marketing manager and a call center manager will use one single user interface to collaborate on and execute an outbound telemarketing campaign.

2.10.5 Enhanced – Universal and Rule-Based Web Postings

Oracle Marketing Online now provides online merchants different ways of selecting personalized content for display either by writing rules that will apply a different strategy to different visitors based on the rules conditions (Rule-based Posting), or by applying the same strategy to all the visitors (Universal Posting).

2.10.6 Enhanced – New Web Merchandising Strategies

Campaigns and products can be recommended to online shoppers based on

- Browsing behavior
- Purchases (past)

This new release also enables merchants to extend their conditions, strategies and business attributes to match their business needs.

2.10.7 New – Web Recommendation Prioritization

Aside from showing the highest affinity content to a customer, merchants want to push content based on business drivers. This trade-off of affinity-based pull vs. business driver-based push is achieved by imposing filtering criteria on the recommendations returned by the posting.

2.10.8 New – Web Placement Management

Oracle Marketing Online ships out-of-the-box placements for iStore templates. In addition, the merchants can define their own placements. With placement management, the merchant has control over the content and layout on the templates that embed Web placements, before publishing them to the world. Through this user interface, the merchant can also modify the postings assigned to the placements without writing any code.

2.10.9 New – Extensible Web Posting Framework

Oracle Marketing Online ships out-of-the-box with seeded strategies and rules conditions. The merchants also have the option to extend these by adding their own customized criteria.

2.11 Workflow Management

Out-of-the-box workflows in Oracle Marketing Online streamline approval processes for marketers. Campaigns, Events, Deliverables, Offers and claim settlement budget requests, are tracked and approved via an automated system of notifications and updates to the appropriate manager. In 11iR7 this offering is enhanced to provide more configurable workflows so that each customer can configure these rules depending on business process. Additional flexibility is provided to enable a marketing super user to override these rules when there is an exception.

2.11.1 Enhanced – Approval Rules

Approvals for objects created in Oracle Marketing Online are set to a default marketing manager or can be configured by creating approval rules based on:

- Business organization
- Priority
- Budget amounts
- Start and end dates

Additionally, each approval rule can have multiple approvers with a rank order to specify who needs to approve first before proceeding to the next approver.

2.12 Usability Features

Increased usability drives end user product acceptance. Oracle Marketing Online places importance on usability of features, thus reducing training costs and time for marketing staff. The browser-based interface and enhanced features improve the experience of general marketers and advanced marketing analysts alike.

2.12.1 New – Mandatory Fields

Oracle Marketing Online is designed with default mandatory fields in order to create objects. For example, campaign name is mandatory. In this release a marketing administrator can specify additional mandatory fields depending on business need. If certain information is essential to the marketing process, that information can be captured in Oracle Marketing Online.

2.12.2 New – Locking Rules

Locking Rules within Oracle Marketing Online allow for flexibility in configuring which fields are locked at which status. For example, budget lines cannot be edited once the campaign is completed. Entire pages associated to an object can also be locked (for example, all costs are locked once they have been approved). This feature provides security to ensure data integrity.

2.12.3 New – Country Filter

Oracle Marketing Online enables a user to filter by country when selecting from a list of values. This applies to marketing objects such as campaigns, events, marketing media, event venues, and lists. For example, a user can filter a large list of venues to see only those located in the United States.

2.12.4 New – Personalized Views

Each user can personalize the way summary information is presented. A user can select search criteria and apply conditions such as “less than,” “greater than or equal to,” and “between” to each individual criteria. The search results can be saved for future reference and used as filters when viewing summary information, such as a list of all campaigns.

2.12.5 New – Summary Data Export

Any tabular summary of information within Oracle Marketing Online can be exported to a pre-defined file format, which can then be saved electronically and used for custom reports, sharing with partners, or collaboration with team members.

2.12.6 New – Application Tip Text

To further increase user-friendliness, Oracle Marketing Online provides useful tips and instructions in the application user interface itself, in addition to the online iHelp tool.

2.12.7 New – Confirmation Messages

After every update or data submission, the HTML interface provides a confirmation message, providing a positive feedback to indicate whether the data has been recorded successfully.

2.12.8 Enhanced – Advanced Search

Using Oracle Marketing Online's Advanced Search feature, a user can search on campaigns, events, deliverables, or other marketing object. To protect sensitive information (for example, budget amounts or costs), you can designate which elements are available for viewing in the resulting details. Results are pre-formatted for printing, or can be saved as an HTML file.

2.12.9 Enhanced – Function Level Security

Security is enhanced by prohibiting users to access a page in Oracle Marketing Online without first logging in to the application. For example, this will prevent unauthorized access by a user who tries to type in the exact URL of a page.

2.13 Trade Management – New Features

Oracle Marketing Online Trade Management option provides consumer product manufacturers a comprehensive set of tools to measurably improve business-to-business return on partner investment through closed-loop planning, execution and analysis.

The Trade Management option is a part of the Oracle E-Business Suite, an integrated suite of applications for the enterprise that enables traditional businesses to transform into e-businesses.

The Trade Management option is built on three premises:

Drive profitable growth by providing tools for evaluating partner ROI. It provides product and promotion information on targets, critical cost to serve information, and planned versus actual results by customer.

Improve account relationships by transforming the traditional sales manager into a customer-centric manager. Trade Management provides the sales representative with complete access to all corporate information on products, pricing, competitors, marketing activities, and sales initiatives thereby enabling more efficient and effective customer and promotion planning.

Reduce costs through improved execution across marketing, sales, corporate finance, and operations groups. For example, comprehensive back office integration gives operations' groups information about expected promotional volume for demand planning so manufacturing and transportation costs can be minimized. It also ties promotional agreements to order processing to increase invoice accuracy. To insure that finance department is kept informed of the impact that trade spending has on the company's financial statements, Trade Management minimizes unexpected financial liabilities and risks of over- or under-utilizing assets and provides the associated reporting. It also facilitates quick resolution of promotional deductions, which saves research costs and eliminates payment of invalid claims.

2.13.1 Trade Planning

Trade planning provides sales and marketing managers of consumer product manufacturers, a comprehensive set of tools to manage the trade promotion planning, execution, and analysis process. Trade Management provides the following new features in campaign/trade promotion management:

- Forecasting based on historical data. Marketing and sales personnel can forecast expected volume lift for trade promotions using historical sales data by time and by product.
- Manufacturer profit calculator allows sales and marketing departments to accurately identify the profitability of trade promotions enabling optimum usage of trade funds.
- Campaign Versions. Headquarter sales and marketing personnel can now create multiple trade promotion scenarios with different offer values. Forecasting and manufacturer profit calculator tools can be used to generate a comparison report to identify the best strategy to drive profitable growth.
- Trade Management includes major enhancements in offers/discount management such as a comprehensive set of discounts:
  - Off-Invoice – amount, percent or lump-sum discount applied on the face of the invoice.
  - Accruals and lump-sum – Bill-back discounts paid to the customer based on proof of performance.
  - Order Value – Discounts based on total value of the order.
  - Promotional goods – Buy X, Get Y discounts.
  - Trade Deal – Combination of off-invoice and accrual discounts.
- Ability to define discounts on multiple products and product category in a single offer.
- Standalone offers. User can create standalone offers without requiring to define a promoting campaign.
- Offer validation based on target customers and promoted products to ensure usage of money from appropriate funds.

- Postings to budget checkbook and GL. Trade Management updates appropriate budget checkbook with offer utilization information based on the customer and the products sold. For accrual (bill-back) discounts, Trade Management updates appropriate General Ledger liability accounts.
- User can now specify one or more maximum usage limits on an offer. The offer is shut down once a limit is reached. Trade Management allows the following maximum usage limit types.
  - Maximum amount limit at the offer header/line – a limit on total discount amount.
  - Maximum quantity limit at the offer line – a limit on total units of a product sold using the offer.
  - Maximum quantity limit per customer – a limit on total units of a product sold to a customer using the offer.
  - Maximum quantity limit per order – a limit on total units of a product sold in one order.
  - Maximum orders limit per customer.
- Offer reuse. Multiple campaigns can promote a single offer through various channels at different times

2.13.2 Funds and Budget Management

Enhanced budget management features included in Trade Management provide marketing and sales organizations with the ability to create and control specific fund/budget types using a variety of parameters such as spending, brand, products, territories, and customers. Trade Management allows flexible budget eligibility rules by product, customer, territory, and time period to control budget usage. Trade Management also provides 'Fully accrued' or 'Live' budgets. Fully accrued budgets can be used to support:

- Royalty payments.
- Allocation of future discretionary funds to sales personnel based on their current sales figures.
- Capture other costs such as Co-operative advertising and Volume Rebates.

Such budgets start with zero balance and the balance grows based on sales activity.

Enhanced allocation engine enables automatic distribution of sales funds and marketing budgets down the sales territory hierarchy. Using the holdback feature, a portion of the allocated money can be reserved for future discretionary allocation. The Budget Threshold feature in Trade Management allows the user to monitor budget usage and provides notifications on over- or under-utilization of budgets. A Company can now establish a budget threshold to generate a notification to the fund manager if more than predefined portion of the budget is committed in the first month. Trade Management graphically represents budget hierarchies in an HTML tree. Users can now expand/collapse the tree to view budget details. Campaign /Offer level checkbook along with drill-down feature on the budget columns such as planned, committed, utilized, and paid provides users a more granular access to the information thereby enabling quick adaptation to changing market conditions.

A manual transfer of money from ‘utilized’ to ‘committed’ column may be necessary if a customer has failed to meet terms of the contract. Also, there is a necessity to free up un-utilized funds upon completion of a campaign. Trade Management now allows users to make manual or automatic adjustments to the budget checkbook to handle such scenarios.

2.13.3 Claims Management

Trade Management facilitates management and resolution of promotional claim requests as well as any types of deductions, promotional or not. A ‘Deduction’ is a short payment on a check remittance which may or may not be related to an invoice. Approximately 90% of all deductions are promotional claims. The deduction amount typically includes amount of the promotional deal, along with other charges such as damages or short shipments. Most often these deductions occur on remittances to the vendor with no supporting information, making it virtually impossible at times to identify the breakdown on reasons.

Trade Management offers out of the box integration with Oracle Accounts Receivable module. AR automatically routes any deductions (short-payments on invoices) to Trade Management for resolution thereby reducing the settlement time. Trade Management provides research and validation tools to monitor performance and facilitate quick claim resolution. Claims personnel now have real-time access to customer promotional deal information along with accrual details through budget checkbook. Trade Management provides claims personnel quick access to discount, order, and invoice information for a particular customer through its tight integration with Order Management, Advanced Pricing, and Accounts Receivables modules.

Trade Management provides robust settlement support for valid claims. Claims personnel can initiate:

- An ‘issue check’ request to AP
- A credit memo/write-off/adjustment request to AR

Upon securing appropriate approval, Trade Management completes the claim settlement process by updating appropriate General Ledger accounts.

2.13.4 Specific Enhancements

- Deliverable kits of Inventory items may now be created without creating the kit in Inventory.
- Event enrollment may be manually frozen to disallow new enrollees regardless of whether space is available.
- A public API allows event registrations to take place over the web.
- An event may added to Inventory or attached to an existing Inventory item.
- A denormalization process has been added to resolve offer eligibilities and store them.
- Events may now be priced by attaching them to multiple price lists.
- A concurrent program has been added to activate event schedules on their start date.
- The Event roster may be exported.
- Links are available on the Campaign and Event summary pages which give direct access to schedules associated with the campaign or event.
- Mandatory and Locking Rules have been implemented for Marketing Mediums.
- Product types are no longer required for the creation of a product.
- In the category assignment page for products, categories are now displayed with their descriptions rather than with their numeric ids.
- A column for source code has been added to the Event summary page.
- The Store page has functionality for product images, walk-in prices and the ability to assign products to *i*Store sections.
- The Roster page for an event has a status field which allows cancellation of a registration.
- There is now graphic support for cost and revenue metrics.

- There is now history support for metrics and costs.
- Personalization is available for metrics on the administration page.
- Segments and lists are now integrated so that a list may be created from a segment in one click.
- List import has support for the Party_ID field, ftp support, and an API for rented lists.
- There is a new list generation mode with support for Advanced Outbound integration.
- There is a new list groups concept between target group and list to support Advanced Outbound integration.
- A List Copy API is available.
- List Import ftp support is available enabling the import of an csv file from an ftp site.

2.14 Obsolete in this Release

2.14.1 Marketing Online

- The flag "Allow Overflow" in event registration set up is removed. The allow overbooking flag provides the necessary functionality.

2.14.2 iMarketing

- Affiliates tab is no longer part of iMarketing/Execution. An affiliate has to be created as an organization with an 'Affiliate' relation. Organization can be found under 'Audience' tab.
- In a rule definition, the 'Empty shopping cart' condition is now defined as 'Shopping cart amount = 0'.
- Posting The style sheet associated with the posting is moved to Styles in Placement. Postings associated with an affiliate has been moved to placement. Affiliates are now associated at the placement level.
- Default posting is no longer supported.
- The system parameter for the server URL is moved to the profile AMS Server URL.

3 Implementation Overview

The following is general information regarding basic concepts used during implementation.

3.1 Implementation Description

Each implementation section of this guide covers the settings required to implement Oracle Marketing Online. Here is a brief description of each type of setting used in the implementation sections.

3.1.1 Profile Options

The procedure for setting up and changing profile options is the same for all Oracle Applications. For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

Profile options may be set at four different levels:

Site. The site level setting affects the entire e-business suite.

Application. When a profile option is set this level it overrides the site level setting for the particular application.

Responsibility. The responsibility level setting affects users of a given responsibility. When a profile option is set at this level it overrides the application level setting for users of the particular responsibility.

User. Settings at the user level affect the individual user only. When a profile option is set at this level it overrides the responsibility level setting for an individual user.

Note: Profile options belonging to Oracle Marketing Online have the prefix of AMS. During implementation, profile options relating to dependencies may be set as well.

Profile Options are summarized in Appendix C.

3.1.2 Lookups

There are three types of Lookups:

System. System Lookups may not be modified or deleted, and may not have additional values added.

Extensible. Extensible Lookups may have additional values added to the list. Seeded extensible Lookups may not be deleted.

User. User Lookups are completely modifiable. They may be modified and/or added to. Seeded user Lookups, if any, may be modified or deleted.

Note: All levels of Lookups may have their visible value, the text displayed to the user, modified.

Lookups are summarized in Appendix D.

3.1.3 Concurrent Manager Programs

Many of the processes that are involved with the operation of Oracle Marketing Online required processes to run periodically or at certain times. These processes are referred to as Concurrent Manager Programs. The setting up and running of Concurrent Manager Programs is described in each section where a Concurrent Manager is required and summarized in Appendix F.

3.1.4 Administration Options

There are a number of administration options that are associated with the individual tabs in Oracle Marketing Online. There are also administration options which affect multiple tabs. Those administration options are collected under the Basic Implementation Chapter.

Many administration options choices are used, throughout the application, to populate drop-down menu selections with a list of values (LOVs).

Administration options are summarized in Appendix E.

3.2 Working with Multiple Currencies

The multiple currency capabilities of Oracle Marketing Online allow your organization to create Budgets, estimate and source Campaigns, Events, Deliverables, and Offers in different currencies. Oracle Marketing Online automatically converts all activities, and transactions occurred against them into a single currency of your choice when showing up on Bins, Charts and Reports on Home Page. User has the ability to choose the default currency into which the Reports, Bins, Charts should display by setting up the profile option 'AMS: Default Currency'. The same currency code is used to default all objects like Budgets, Campaigns, Events, Deliverables, and Offers. However the user has the choice of changing the currency code as he/she intends.

Budgets

Oracle Marketing Online provides the ability to create budgets in different currencies. Users can Transfer to different budgets or Request money from budgets in any currency. It is not required that the budgets sourcing these requests should be in the same currency. When a Requester makes a request for money in one currency, he/she would also see the approval notification and money transfer in the same currency. Similarly when Budget Owner receives a request, the system will automatically convert the requested amount into the currency of the budget. The budget owner will then approve the amount in budgets currency.

Campaigns, Events, Deliverables and Offers

Oracle Marketing Online provides the ability to estimate and request money for these activities in different currencies. Users can define these activities and estimate in any currency, but could request money from budgets belonging to different currencies. Just as mentioned above, the system will automatically convert the requested amount into appropriate currencies.

Oracle Marketing Online will calculate the currency conversion for each and every individual transaction based on the currency conversion type specified on the profile option 'AMS: Currency Conversion Type'. This profile is set at the site level. It is required that one currency conversion type is defined for Marketing Budgetary purposes in Oracle General Ledger. This currency conversion type is also used to convert all the transaction currency into functional or accounted currency of the Sets of Books specified in Systems parameters screen.

Claims

Oracle Marketing Online allows you to create Claims in any foreign currency, not just the functional currency. Claims can be made in any currency against any marketing object such as Campaigns, Offers, or against Invoices. Claims can be promotion related or non promotion related. When a claim is settled against the promotional accruals referring to Campaigns, Offers, Orders, or Invoices, it is not required that the claim currency and the accrual currency has to be same. In such situations, Claims will ensure that the accounted amount that is claimed and the accounted amount that is settled are equal.

Claims do not use the currency conversion type specified on the profile option AMS: Currency Conversion Type. Instead, Claims uses the Exchange Rate information provided in the Amount section of the claim. When a claim is created in foreign currency, system automatically defaults the exchange information from the systems parameters. However, the system also lets user to change the exchange information on the claims screen.

You may also define daily conversion rates. Daily conversion rates enable Claims to automatically calculate exchange rate information when you enter foreign currency claims. See: Entering Daily Rates in the *Oracle General Ledger User's Guide*.

3.3 Implementation Sequence

Summary of Steps needed to Implement Oracle Marketing Online.

Step	Task	Required
4.1	Setting up General Ledger	Yes
4.1.1	Setting up Accounting Calendar Types	Yes
4.1.2	Setting up an Accounting Calendar	Yes
4.1.3	Setting up a Marketing Calendar	Yes
4.1.4	Enabling Additional Currencies	Optional
4.1.5	Set Currency Conversion Rates	Yes
4.1.6	Set up Currency Conversion Rate Types	Optional
4.1.7	Create a Set of Books	Yes

Step	Task	Required
4.2	Set up HRMS	Yes
4.2.1.	With Full Oracle HRMS	
4.2.2	With Shared Oracle HRMS	
4.2.3	Create Lookup Tables for Organization Types	Yes
4.2.4	Creating Locations	Yes
4.2.5	Business Groups	Yes
4.2.6	Creating Organizations	Yes
4.2.7	Assigning Attributes to Responsibilities	Yes
4.2.8	Creating and Assigning a Legal Entity, Operating Unit and HR Organization for a Specified Organization.	Yes
4.2.9	Assign Multi Org Responsibilities	Yes
4.3	Implement Oracle Inventory	Yes
4.3.1	Creating Units of Measure	Yes
4.4	Creation of the Implementation User	Yes
4.5	Implementation of Foundation and Dependency Components	Yes
4.5.1	Setting up CRM Foundation: Resource Manager	Yes
4.5.2	Setting up CRM Foundation: Task Manager	Yes
4.5.3	Setting up CRM Foundation Note Types	Optional
4.5.4	Setting up Advanced Pricing	Yes
4.5.5	Setting up Oracle *i*Store	Optional
4.5.6	Setting up Oracle Accounts Payable	Optional
4.5.7	Setting up Oracle Accounts Receivable	Optional
4.6	Implement Marketing Common Components	Yes
4.7	Implement Home Page Bins and Reports Security	Optional
5.1	Implementation Overview	
5.2	Implement Campaigns and Programs	Optional
5.3	Implement Budgets	Optional

Step	Task	Required
5.4	Implement Events	Optional
5.5	Implement Offers	Optional
5.6	Implement List	Optional
5.7	Implement List Import	Optional
5.8	Implement Data Mining	Optional
5.9	Implement Products	Optional
5.10	Implement Price Lists	Optional
5.11	Implement Deliverables	Optional
5.12	Implement Marketing Intelligence	Optional
5.13	Implement Web Posting	Optional
5.14	Implement Web Placement	Optional
5.15	Implement Claims	Optional
6.1	Creating Marketing Mediums	Optional
6.2	Creating Metrics	Optional
6.3	Creating Venues	Optional
6.4	Creating Categories	Optional
6.5	Creating Custom Setups	Yes
6.6	Creating Activities	Optional
6.7	Creating User Statuses	Optional
6.8	Creating Locking Rules	Optional
6.9	Creating Mandatory Rules	Optional
6.10	Creating Approval Rules	Yes
6.11	Create Web Offer Queries	Optional
6.12	Creating Data Sources	Optional
6.13	Word Replacement Rules	Optional
6.14	Creating Geography	Optional
6.15	Creating Budget Adjustment Types	Optional
6.16	Creating Budget Thresholds	Optional

Step	Task	Required
6.17	Creating Claim Actions	Optional
6.18	Creating Claim Reasons	Optional
6.19	Creating Claims Types	Optional
6.20	Creating Claims System Parameters	Optional
6.21	Creating Trade Profile Item for Account and Organization	Optional
7.1	User Creation	Yes
7.1.1	Defining Marketing Groups	Yes
7.2	Optional Employee Setups	Optional
7.3	User Security	Yes
7.4	Security for Sales Online Pages	Yes
8.1	Setting up One to One Fulfillment	Optional
8.2	Setting up Marketing Encyclopedia	Optional
8.3	Setting up Oracle Partners Online	Optional
8.4	Setting up Scripting	Optional
8.5	Setting up CRM Foundation: Territory Manager	Optional
8.6	Setting up Call Center / Advanced Outbound	Optional
8.7	Setting up Interaction History	Optional
8.8	Setting up Descriptive Flexfields	Optional
8.9	Setting up Default Budgets	Optional
8.10	Checking Post Implementation Steps	Yes

4

Basic Implementation

This chapter covers the set up of various foundation and dependency components necessary before the implementation of Oracle Marketing Online may proceed. It also covers the basic implementation steps that are common across multiple functionalities within Oracle Marketing Online.

In order to begin, it is beneficial to create the Implementation User, with the roles and responsibilities necessary to complete the implementation of Oracle Marketing Online. Complete user setup is covered in Chapter 7 User Setup.

Steps

Step	Required	Description
4.1 Setting up General Ledger	Yes	Create basic accounting information.
4.2 Set up HRMS	Yes	Create basic human resource information.
4.3 Implement Oracle Inventory	Yes	Implement basic inventory and create unit of measure information.
4.4 Creation of the Implementation User	Yes	Create an Implementation User with all the responsibilities and roles required for the implementation of Oracle Marketing Online.
4.5 Implementation of Foundation and Dependency Components	Yes	Implement foundation and dependent components as required for the organization’s implementation.
4.6 Implement Marketing Common Components	Yes	Implement Components that are common to multiple tabs within Oracle Marketing Online.

Step	Required	Description
4.7 Implement Home Page Bins and Reports Security	Yes	Provides security for viewing information on the home page.
4.8 Enabling Default Responsibilities	Yes	Enables the setting of a default responsibility in the Profile page.

4.1 Setting up General Ledger

4.1.1 Setting up Accounting Calendar Types

Steps

1. Log in with General Ledger Super User responsibility.
2. Navigate to Applications > Functions > Setup > Financials > Calendars > Types.
3. Enter standard periods per year and year type (calendar or fiscal) and a description. Click in the Period Type column and select View > Find to display a list of available Period Types.
4. Save your work.

4.1.2 Setting up an Accounting Calendar

1. Navigate to Applications > Functions > Setup > Financials > Calendars > Accounting.
2. Enter the name of the accounting calendar in the Calendar field.
3. Add a description.
4. Enter Prefix, Type, Year, Quarter, Number, From and To dates, and Name in the table. Click New on the toolbar to generate additional table rows.
5. Save your work.

4.1.3 Setting up a Marketing Calendar

1. Navigate to Applications > Functions > Setup > Financials > Calendars > Accounting.
2. Enter the name of the marketing calendar in the Calendar field.

3. Add a description.
4. Enter Prefix, Type, Year, Quarter, Number, From and To dates, and Name in the table. Click New on the toolbar to generate additional table rows.
5. Save your work.

Note: This Marketing Calendar will be selected for the System Profile Option AMS Marketing Calendar, later in this chapter.

4.1.4 Enabling Additional Currencies

Oracle Marketing Online is seeded with most of the world's currencies. To enable currencies follow these steps.

Steps

1. Log in with General Ledger Super User responsibility.
2. Navigate to Applications > Functions > Setup > Currencies > Define.
3. Enter a three digit code for the currency. Select View > Find to display a list of available currencies and their codes.
4. The Description, Issuing Territory, Precision and Extended Precision will be completed for you, if known.
5. Add the Symbol, Minimum Accountable Unit, Currency Derivation (Type, Factor, and Effective Date) and Effective Dates.
6. Select the Enabled checkbox.

See Working with Multiple Currencies.

4.1.5 Set Currency Conversion Rates

Steps

1. Navigate to Applications > Functions > Setup > Currencies > Rates > Daily.
2. Click Enter By Date Range to enter a range of dates the rate is applicable.
3. Select the From and To currencies.
4. Enter a From date and a To date.
5. Type = corporate or spot. Other types may be defined below.

6. Enter the exchange rate for the currencies and period. The inverse exchange rate will automatically be calculated.
7. Save your work.

4.1.6 Set up Currency Conversion Rate Types (optional)

Steps

1. Navigate to Applications > Functions > Setup > Currencies > Rates > Types.
2. Enter Rate Type and Description (for example, Corporate, Corporate Exchange Rate, Spot, or Spot Exchange Rate).
3. Save your work.

4.1.7 Create a Set of Books

Steps

1. Navigate to Applications > Functions > Setup > Financials > Books > Define.
2. Enter the full name of the Set of Books.
3. Enter a Short Name.
4. Enter a Description.
5. Select a Chart of Accounts. Click the ellipsis to display the available list.
6. Select the Functional Currency.
7. Select an appropriate Calendar.
8. The Period Type will be filled in automatically.
9. Save your work and close the form.

4.2 Set up HRMS

The responsibilities and navigation paths are different for the Oracle HRMS and Shared Oracle HRMS. See below for Responsibilities and base Navigation paths for each.

This section describes the creation of Organizations, Business Groups and Business Units. This is done prior to creating employees to ensure that employees are set up in the correct HR Organization.

4.2.1 With Full Oracle HRMS

Responsibility: HRMS Manager

Navigation: People > Enter and Maintain

4.2.2 With Shared Oracle HRMS

Responsibility: CRM Administrator

Navigation: CRM Foundation > Resource Manager > Maintain Employees > Employees

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Note: If you have the full installation of Oracle HRMS then you cannot create employees under CRM Foundation > Resource Manager > Maintain Employees > Employees. You will receive an error message indicating that you must use HRMS.

4.2.3 Create Lookup Tables for Organization Types

In this step you are creating suborganization types. For example, if the organization is divided into business groups, then create an organization type called Business Group. If the organization is divided into subsidiaries, create an organization type called Subsidiary.

The next several groups of steps serve to create an organizational hierarchy for the organization. Create the lowest level object first and then build up the hierarchy.

Steps

1. Switch responsibility as noted above.
2. Navigate to Applications > Functions > Other Definitions > Lookup Tables.
3. Select View > Find and enter ORG% to locate ORG_TYPE.
4. Enter a User Name.
5. In the Application field, use the ellipsis to select Oracle Marketing.
6. Enter a description.
7. In the table, enter a Code, Meaning, Description, Tag, From and To Dates, and select the Enabled checkbox to make the organization type available. Enter as many organization types as desired.

8. Save your work.

4.2.4 Creating Locations

Steps

1. Navigate to Applications > Functions > Work Structures > Location.
2. Enter a Name.
3. Enter a Description.
4. Select an Address Style
5. Enter Address information. Click OK.
6. Save your work.

4.2.5 Business Groups

Set up organizations in Oracle HRMS to record the physical locations where your employees work and all the different departments and sections which make up the organization. A default business organization has been set up for you, so this step is not required for sales applications to be fully operational. However, you must set up organizations if you plan to use any financial ERP applications in the future.

Organizations can also help you set up security for the marketing applications. For example, you can attach responsibilities with different levels of security to the different operating units you set up as organizations. Any individuals employed in those units automatically inherit that responsibility.

See the Organization Management chapter in the *Using Oracle HRMS -- The Fundamentals* for detailed setup steps and *Multiple Organizations in Oracle Applications.*

4.2.6 Creating Organizations

Steps

1. Navigate to Applications > Functions > Work Structures > Organization > Description.
2. Click New.
3. Enter a Name for the organization.

4. Select an Organization Type (from the list entered above).
5. Select a Location (from the list entered above).
6. Select whether the organization is Internal or External.
7. Select an Organization Classification from the LOV by clicking the ellipsis.
8. Select Enabled.
9. Save your work.
10. Click Others.
11. Click the ellipsis to enter and select information for the particular organization.
12. Enable by selecting the checkbox.
13. Repeat Steps 7 through 12 to enter additional classifications.
14. Save your work.
15. Click Add to add additional organizations as necessary.

4.2.7 Assigning Attributes to Responsibilities

Steps

1. Switch responsibility to System Administrator.
2. Navigate to Applications > Functions > Profile > System.
3. Responsibility field: Select the responsibility to be assigned to the profile.
4. In the profile field enter HR% and click Find.
5. Select an organization for the HR: Security Profile.
6. Select an organization for the HR Business Group. (This should be the same organization as selected for the HR: Security Profile.)
7. Save your work.

4.2.8 Creating a Legal Entity, Operating Unit, HR Organization, and Business Units

Steps

1. Log on with the appropriate HRMS Manager responsibility.

2. Navigate to Applications > Functions > Work Structures > Organization > Description.
3. Select the organization to assign its legal entity, operation unit and HR Organization.
4. Adding a GRE / Legal Entity:
    a. Under the organization classifications name, add GRE / Legal Entity.
    b. Select Enabled.
    c. Save your work.
    d. Click Others.
    e. Select Legal Entity Accounting.
    f. Click the ellipsis to enter information.
    g. Select a Set of Books (defined above).
    h. Click OK.
    i. Save your work.
5. Add an Operating Unit:
    a. Under Organization Classifications Name, add Operating Unit.
    b. Click the ellipsis to select a classification.
    c. Select a Legal Entity from those entered in Step 4.
    d. Click Others.
    e. Select Legal Entity Accounting.
    f. Click on the ellipsis to enter information.
    g. Select a set of books.
    h. Click OK.
    i. Enable by selecting the checkbox.
    j. Save your work.
6. Adding an HR Organization:
    a. Under Organization classifications name, add HR Organization from the LOV.
    b. Enable by selecting the checkbox.

   c. Save your work.
   d. Click Others to enter additional information.
   e. Save your work.
7. Close the form
8. Creating Business Units:
   a. Click New.
   b. Fill in Name of Business Unit.
   c. Select Type (Business Unit).
   d. Select Internal or External.
   e. Save your work.

4.2.9 Assign Multi Org Responsibilities

Oracle Marketing Online expects the implementation of Multiple Organization Structure. Please refer to *Multiple Organization in Oracle Applications* for additional information.

Assign Multi Org responsibilities to a selected responsibility to display the Business Unit when using that responsibility.

Steps

1. Log on with System Administrator Responsibility.
2. Navigate to Applications > Functions > Profile > System.
3. Select responsibility to assign to the profile.
4. In the profile field enter MO%.
5. Click find and select MO: Operating Unit.
6. Select the appropriate Operating Unit. The organization's Business Rules will determine how Operating Units are structured.
7. Save your work.

4.3 Implement Oracle Inventory

Implement Inventory as described in the *Oracle Inventory Implementation Guide*.

4.3.1 Creating Units of Measure

Units of measure must be entered into Inventory to assist in defining items placed therein. For purposes of Oracle Marketing Online, events, deliverables, products, and offers depend on information held in Oracle Inventory.

Steps

1. Log in using Inventory responsibility.
2. Navigate to Applications > Functions > Setup > Units of Measure > Classes
3. Select an Organization from the displayed list.
4. Click Add on the toolbar to add an additional line in the table if necessary.
5. Define a UOM class by:
   a. Entering the class name such a length, time, area or weight.
   b. Enter a description
   c. Enter a base unit. For example, a base unit of time might be a second (click Units of Measure to enter information).
   d. Enter a UOM Code (maximum of 3 characters).
   e. Save your work.
6. Define a UOM by selecting a class row in the table and then clicking Units of Measure and entering the following:
   a. Name.
   b. Unit of Measure Code (maximum of 3 characters).
   c. Description.
   d. Repeat for additional Units of Measure in the class.
   e. Save your work.
7. Click Conversions to enter conversion information for that Unit of Measure Class. Be sure that both Units of Measure have been defined before entering a conversion between them.
   a. Select or enter a Unit of Measure. Click the ellipsis to display a list if more than one UOM is defined for that class.
   b. The class column defaults to the same class. Change if converting between classes.

c. Enter a conversion ratio. For example, one liter is 1000 milliliters.

d. The base unit defaults to the base unit for the class.

e. Save your work.

Alternative Steps

1. Alternatively, Units of Measure may be entered by navigating to Applications > Functions > Setup > Units of Measure > Units of Measure and completing the steps above.

2. Alternatively, Units of Measure Conversions, may be entered by navigating to Applications > Functions > Setup > Units of Measure > Units of Measure Conversions and completing the steps above.

4.4 Creation of the Implementation User

Creating an Implementation User with all the necessary responsibilities will make implementing Marking Online easier as only one user and password will be required to complete all steps.

Note: The Implementation User must be assigned to a group with Sales and TeleSales and Oracle Marketing Usages. If this group does not exist, please see section 7.1.1 to create this group. The Implementation User requires these groups in order to access the Audience tab and Administration tab.

Note: You must perform these steps in this order shown.

Steps

Step	Required	Description
1. Create the Employee	Yes	
2. Create an Implementation User	Yes	Creates the user with all the responsibilities necessary to implement Oracle Marketing Online. Users must be matched to employees.
3. Set Profile Options	Yes	Set Profile Options for the User.

Step	Required	Description
4. Import Employees	Yes	Import employees into Resource Manager.
5. Specify Roles and Groups	Yes	Some roles are required for access to tabs.
6. Run Concurrent Manager Program	Yes	Updates denormalized tables with group information. Must be run to put the Implementation User into Groups.

1. Create the employee:
   a. Log into forms.
   b. Select appropriate HRMS Manager Responsibility.
   c. Navigate to People > Enter & Maintain.
   d. In the Find Person box, select New.
   e. Enter the following information:
      – Last Name and First Name
      – Title (courtesy title: Mr., Ms.)
      – Gender (will populate based on title, if possible)
      – Type = Employee
      – Social Security # (will be checked against existing SS#)
      – Birth Date
   f. Save your work. A confirmation will appear in the lower left corner of the window.
   g. Click Assignment and enter the following:
      – Organization
      – Team/Group
      – Location
      – Supervisor
   h. If a dialog with Update and Correction buttons displays, select Correction to revise existing data and Update to create a new record.

   i. Save your work. A confirmation will appear in the lower left corner of the window.
   j. Select Yes to use the new location
2. Creating an Implementation User:
   a. Log into Forms under the System Administrator Responsibility.
   b. Navigate to Security > User > Define.
   c. Create the Implementation User.
   d. Assign the employee created in Step 1 to the Implementation User.
   e. Assign the following responsibilities to the Implementation User:
      – General Ledger Super User
      – HRMS Manager
      – Inventory
      – CRM Administrator
      – Oracle Marketing Administrator
      – Oracle Marketing Super User
      – Preferences
      – Workflow User Web Applications
      – System Administrator
      – Oracle Receivables (Trade Management)
      – Oracle Payables (Trade Management)
      – Advanced Pricing
      – Receivables Manager
   f. Log out and then back in as the Implementation User.
   g. Select the System Administrator responsibility.
3. Set Profile Options:
   a. Navigate to Profile > System.
   b. Enter user name just created.
   c. Search for profile JTF_PRO%.

d. Set Default Application in the User column. For the Implementation User, this responsibility = 530.

e. Set Default Responsibility in the User column. For the implementation users, this responsibility = 21706 (Oracle Marketing Super User).

f. Save your work.

4. Import Employees:

a. Change responsibility to CRM Administrator.

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

c. Locate the employee just created. Enter employee's name in the name fields and click Search.

d. Click Create Resource.

e. Click OK to accept default values.

f. Click Save Resource (record the transaction number).

5. Specify Roles and Groups:

Note: This step is required to gain access to the Audience and the Administration tabs.

---

a. Navigate to Resource Manager.

b. Select the user as the resource.

c. Click Details.

d. On the Roles tab, select a role type of Sales and a Role of Sales Representative.

e. On the Group tab, select a group with Usages of Sales and TeleSales and Oracle Marketing.

f. Make sure that the Group Member Role Sales Representative is associated to the above group on the resource details screen.

6. Run the Concurrent Manager Program, AMS Group Access Refresh. (See Set Up and Run Concurrent Manager Programs.)

4.5 Implementation of Foundation and Dependency Components

These steps in the basic implementation are those that are common to all implementations of Oracle Marketing Online. Regardless of the individual tabs and features that are implemented by an organization, these steps must be completed before moving on to the implementation steps for individual tabs and features.

Note: Implement the following dependent components as necessary.

4.5.1 Setting up CRM Foundation: Resource Manager

Resource Manager is used to create groups, role and role types and to import employees as resources. See the *Oracle CRM Foundation Implementation Guide* for more information.

4.5.2 Setting up CRM Foundation: Task Manager

Optional for basic implementation.

If implementing task transition rules, set the following profile option: Task Manager: Default Task Status, after defining a rule and assigning it to an appropriate responsibility. If no rules are assigned to a responsibility, all statuses will be displayed in the Status LOV and this profile option need not be set.

1. Set System Profiles:
   a. Log into Forms as the Implementation User and select the System Administrator Responsibility.
   b. Navigate to Functions > Profile > System.
   c. Enter the appropriate profile name in the Profile Field and click Find. See the table below for the names of available profiles.
   d. Enter the appropriate value in the column corresponding to the level indicated.
   e. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
Task Manager: Default Task Status	Optional	Appli cation	User Defined	Required for implementing a task transition rule. This profile option must be set to the initial status of the rule.
Task Manager: Owner type for a task	Optional	Appli cation	User Defined	Specifies the default task type when creating a task.
Task Manager: Default Priority	Optional	Appli cation	User Defined	Specifies the default task priority when creating a task.
Task Manager: Default assignee status	Optional	Appli cation	User Defined	Specifies the default assignee status when creating or assigning a task.

If using Task Transition Rules, a System profile, Task Manager: Default Task Status, must be set to the first status value defined in Task Status Transition Rule for Oracle Marketing Applications, and Oracle Marketing Super User Responsibility. Refer to the Implementing Tasks section of the *Oracle CRM Foundation Implementation Guide* for information on Tasks.

4.5.3 Setting Up CRM Foundation Note Types

Optional for basic implementation.

Oracle Notes is a CRM Foundation Component. Oracle Notes comes with a set of predefined note types. You may choose not to use the predefined note types and create customized note types of your own. Or, you can use both the predefined set and additional customized note types.

Refer to the Implementing Notes section of the *Oracle CRM Foundation Implementation Guide* for additional information about setting up Oracle Notes.

Use the following procedure to set up note types.

Steps

1. Choose Notes Setup> Note Type Setup under the CRM Administrator responsibility.

The Application Object Library: Note Type Lookups window appears.

2. Define the code, meaning, and description as desired. It is only necessary to define a tag for a new, customized note type.
3. Save the record when you are finished.
4. If specific Note Types are to be associated only with certain marketing objects, complete the following steps to assign a note type to a specific marketing object:
    a. Select Notes Setups > Source and Note Type Mappings under the CRM Administrator Responsibility.
    b. Choose the desired marketing object from the LOV for the Source Object field.
    c. Select the newly created note type.
    d. Save the record.
    e. Repeat for additional marketing objects.

Note: If a note type is not associated with a specific marketing object, it becomes available to all marketing objects.

4.5.4 Setting up Advanced Pricing

Required for Products.

4.5.5 Setting up Oracle *i*Store

Required for Product Recommendations through Web Posting and Web Placement.

4.5.6 Setting up Oracle Accounts Payable

Required for Claims Payment in Trade Management.

4.5.7 Setting up Oracle Accounts Receivable

Required for Trade Management.

4.6 Implement Marketing Common Components

These steps are used to implement common Profile Options, Lookups, Concurrent Manager Programs and Administration Options.

Prerequisites

Admin Groups must be set up and available.

Steps

Step	Required	Description
1. Set System Profiles	Yes	Set up common System Profiles
2. Set up and Run Concurrent Manager Programs	Yes	Run concurrent programs
3. Administration Setup	Yes	

1. Set System Profiles:
   a. Log into Forms as the Implementation User and select System Administrator responsibility.
   b. Log into Forms as the implementation user and select the System Administrator Responsibility.
   c. Navigate to Functions > Profile > System.
   d. Enter the profile name in the Profile Field and click Find.
   e. Enter the appropriate value in the column corresponding to the level indicated.
   f. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
AMS System Timezone	Yes	Site	Select the timezone the central server is in.	Timezones are defined in HZ_ TIMEZONES.

Option	Required	Level	Setting	Effect/Limitation
AMS Admin Group	Yes	Site	Select from any group defined in JTF Resource Groups	Resources that are part of this group will have full access to all campaigns, events, and other marketing objects. Note that this should be a single level group.
AMS Default Currency Code	Yes	Site	Select from currencies defined in FND_ CURRENCIES	This becomes the default functional currency. All transactions will be converted and stored in this currency. This will be the default currency for Currency LOV.
AMS Currency Conversion Type	Yes	Site The User level should not be selected.	Corporate, Spot or other conversion type defined in GL	If the functional currency of the organization and the transactional currency of the marketing object are different, this conversion will be used.
AMS Source Code Date Format	Yes	Site	Any valid date format	Used in the generation of source codes.
AMS Source Code Sequence Length	Yes	Site	Maximum field length is 30.	Source Code includes Geography code, Month code, Activity code, Source code digits and Suffix. See Source Codes.
AMS: UOM Area	Yes	Site	Depends on UOM Setup	If not set correctly, will not be displayed for fields that use UOM (for example, area in square feet).
AMS: UOM Length	Yes	Site	Depends on UOM Setup	If not set correctly, will not be displayed for fields that use UOM (for example, length in feet).
AMS: UOM Quantity	Yes	Site	Depends on UOM Setup	If not set correctly, will not be displayed for fields that use UOM (for example, units in each).
AMS: UOM Time	Yes	Site	Depends on UOM Setup	If not set correctly, will not be displayed for fields that use UOM (for example, time in minutes).
AMS Profile Search Set Size	Yes	User	Numeric	Indicates the number of rows displayed in selection windows.

Option	Required	Level	Setting	Effect/Limitation
AMS Upgrade Complete	Optional	Site	Yes/No	Yes means no upgrade and No means will upgrade data. Set this profile to No if the upgrade has run once already.
AMS: Validation	Optional	User	0-100	This profile option affects the validation severity at the database level. A value of 100 (Maximum value of 100) would cause the APIs to validate the passed data very stringently.
OSO: Minimum search string length	Optional	Site or User	User Defined	The default setting is 0. This profile determines the number of characters that must be entered before performing a search.
OSO: Search Lead Wildcard	Optional	Any	Yes/No	If Yes, the wildcard (%) will be allowed as the first character in a search string. If No, and the wildcard is entered as the first character, the system will give the user an error message.
AMS: Grace Period in Days	Yes	User	User/Org determined number of days	When automatic reconciliation of budgets is performed, this grace period is checked. If the marketing object is older than the ending date plus the grace period, any remaining funds associated with the marketing object are returned to the budgets they were drawn from. This also sets the number of days after the completion of a campaign for the concurrent manager to delete the target group entries from the AMS_LIST_ENTRIES table default is 30 days.
JTF Home Page File Name	Optional	Site or Appli cation	User Defined.	Enter a file name of the jsp file (for example, jtfhomepage.jsp). If no value is supplied, a generic information page is displayed. If a file is supplied it will be displayed on the home page.

2. Set up and run Concurrent Manager programs:

   a. Switch to the appropriate responsibility.

   b. Navigate to Applications > Functions > Setups > Concurrent Requests.

   c. Click Submit a New Request.

See the table below for concurrent manager programs and their descriptions.

Concurrent Manager	Required	Responsibility	Description
AMS Group Access Refresh	Yes	Oracle Marketing Administrator	Updates denormalized tables with group information. Should be run on a periodic basis according the organization's Business Rules. Changes made to the resource groups will not take effect in the application's security until this program is run.
AMS Team Access Refresh	Yes	Oracle Marketing Administrator	Updates denormalized tables with team information. Should be run on a periodic basis according to the organization's Business Rules. Teams added to marketing objects will not gain access to the marketing objects until program is run.
AMS: Portal Cache Daemon	Yes	Oracle Marketing Administrator	Populates the Marketing subtab on the Home tab.
Workflow Background Process	Yes	System Administrator	Starts the Workflow engine.
Load Geographic Hierarchies	Yes	CRM Administrator	This program must be run each time that the geographies are changed.
AMS Load Inventory Categories	Yes	Inventory	Loads categories from the MTL schema to the AMS schema denormalized tables. This program should be run if and when a new category is created in Inventory.

3. Administration Setup:

   a. Log into Marketing Online as the Implementation User.

   b. Navigate to Administration > Marketing

c. Make the following selections. See the Administration section for additional information.

Component	Item	Choices	Effect
Setup	Custom Setup	User created and seeded	Create the custom setups that will be used for campaigns, events and other objects. These choices will populate the setup type LOVs.
Setup	Activity	User created and seeded	Create the activities that will be used for various marketing objects. These choices will populate the activity LOV.
Setup	User Status	User created and seeded	Create the user statuses that will be used for various marketing objects.
Setup	Locking Rule	User created and seeded	Create the locking rules that are determined by the organization's Business Rules. Fields specified here will be locked for update at the statuses specified.
Setup	Mandatory Rule	User created and seeded	Create the mandatory rules that are determined by the organization's Business Rules. Fields specified here are must be completed during object creation.
Setup	Approval Rule	User created	Create the approval rules budget and theme approvals for campaigns, budgets and other objects.
Geography	Geographic Area	User created and seeded	Create the geographic areas that will be used by Marketing Online, if required. After creating the Geographic Areas, log into Forms and run the concurrent manager program Load Geographic Hierarchies. This must be done each time the geographic areas are updated.

4.7 Implement Home Page Bins and Reports Security

Use

Security for home page bins and reports is a very useful feature, it lets you control the types of bins and reports available to a specific responsibility. A User will not be able to see the components until appropriate responsibility is assigned to them. Initially when there is no security assigned a message will be displayed in the components saying Insufficient Privileges to Access. Only a System administrator can change the responsibilities associated with a component.

There are two methodologies for implementing security. The first methodology is used when multiple components are associated with the same responsibility. The second methodology is used when a particular component is associated with multiple responsibilities.

Steps for Multiple Components to Same Responsibility

1. Logon to the admin console using the 'SYSADMIN' account.
2. Navigate to Design > Declarative Components > Component Security.
3. Select Responsibility to Components radio button.
4. Click Next to display a page that has a list of Responsibilities based on the Application selected.
5. Select the Responsibility that needs to be assigned and click the 'Next' button. The next page has a drop-down list of Applications and a UI Shuttle that contains two columns: Available Components and Selected Components.
6. Select the application whose components need security assigned to them.
7. Then select the Components from the list and click the 'Update' button to save the data.

Steps for Single Component to Multiple Responsibilities

1. Logon to the admin console using the 'SYSADMIN' account.
2. Navigate to Design > Declarative Components > Component Security.
3. Select Component to Responsibility radio button.
4. Click Next to display a page which has the listings for all the Applications and the Components. List of components is populated on the basis of Application selected.
5. Select the Application and the component and click the 'Next' button. This takes the user to a page which has the same UI Shuttle but with the list of Available and Selected Responsibilities.
6. Available Responsibilities Column is populated on the basis of application selected. To chose the application a drop-down is provided on top of the UI shuttle.
7. Now Multiple responsibilities can be selected and assigned to the component.
8. Click Update to save your changes.

Create Lookups for Home Page Components

1. Log into Forms and select Oracle Marketing Administrator responsibility.
2. Navigate to Functions > Setups > Lookups.
3. Use View > Find to locate the individual keys.

> **Note:** System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for Lookups and their types, values and meanings.

Key	Type	Values	Meanings
AGGREGATE_BY	System	YEAR MONTH QTR INCREMENT	Year Month Quarter Increment
AMS_YEARS	System	1995 1996 1997 1998 1999 2000 2001 2002	1995 1996 1997 1998 1999 2000 2001 2002
AMS_QUARTERS	System	Q1 Q2 Q3 Q4	Q1 Q2 Q3 Q4

Note: Before testing the implementation of Home Page Bins, complete the Implementation of Marketing Intelligence in section 5.12

Test Implementation of Home Page Bins and Reports Security

1. Log into the application with a user account which has any of the responsibilities, as assigned to the components.
2. On the Home Page there is a ‘Personalize’ link. Click on that link and this will take to a page which has two UI Shuttles to allow the personalization of Bins and Reports. One shuttle is for Bin components only and the other is for Reports and Graphs.
3. Left hand column for both these shuttles display list of all the components, for which security has been assigned.
4. If security is not assigned properly, then the left hand side column will not have those components as available components.
5. If those components are there in the Available component List, then chose the components and click ‘Update’. This will take to the home page rendering the new components selected from Personalization page.
6. To Verify it further, now on the home page, the components should display the data. If they still have the message ‘Insufficient Privileges to Access’, then the security is not assigned properly.
7. Follow the steps described in ‘Steps to Implement Security’ again to check the security.

4.8 Enabling Default Responsibilities

Performing these steps will enable users to set a default responsibility within their available responsibilities.

Prerequisites

None

Steps

1. Log into the admin console using the ’SYSADMIN’ account.

2. Navigate to Settings > Site Preferences > Interapplication Bar > Navigation Group Setup.
3. Enter a Group Name.
4. Enter a Description for the group.
5. Leave Status as Active.
6. Enter a value for the Display Order.
7. Click Update.
8. Click the Details icon to the right of the Group Name or click Navigation Group Details from the Side Navigation Menu.
9. Select the Application for the group.
10. Click Update.
11. This will create an application navigation list across the top of the screen. Click the application name to switch between two or more applications.

Test Enabling of Default Responsibilities

1. Log into the application with a user account.
2. Navigate to Profile > Personalization > Navigation Preferences.
3. Select a Default responsibility associated with the application chosen for the group.
4. Click Update.
5. Log out and back in. The application associated with the new default responsibility should display.

5

Business Function Implementation

5.1 Implementation Overview

Complete the steps below as necessary for your implementation.

Step	Required	Description
5.2 Implement Campaigns and Programs	Optional	Set up the Campaign tab. Required for Trade Management.
5.3 Implement Budgets	Optional	Set up the Budget tab. Required for Trade Management.
5.4 Implement Events	Optional	Set up the Events tab.
5.5 Implement Offers	Optional	Set up the Offers subtab, available from the Campaign and Products tabs. Required for Trade Management.
5.6 Implement List	Optional	Set up the List subtab, available on the Audience tab.
5.7 Implement List Import	Optional	Set up the List Import subtab, available on the Audience tab.
5.8 Implement Data Mining	Optional	Set up the Analytics tab.
5.9 Implement Products	Optional	Set up the Products tab.
5.10 Implement Price Lists	Optional	Set up the Price Lists subtab, available on the Products tab.
5.11 Implement Deliverables	Optional	Set up the Deliverables tab.
5.12 Implement Marketing Intelligence	Optional	Set up Bins, Reports and Graphs for the Home Page, including Daily Business Close.

Step	Required	Description
5.13 Implement Web Posting	Optional	Set up the Web Posting subtab, available on the Execution tab.
5.14 Implement Web Placement	Optional	Set up the Web Placement subtab, available on the Execution tab.
5.15 Implement Claims	Optional	Set up the Claims tab. Required for Trade Management.

5.2 Implement Campaigns and Programs

Campaigns are the heart of Marketing Online. Almost every other object within Marketing Online is associated with a campaign in some manner. Campaigns are the vehicle through which most marketing activities are conducted.

Programs are an umbrella object used to link many different marketing objects together, such as an event and the campaign that promotes it.

Use

Campaigns integrate with Lists through Campaign Schedules, the execution component of campaigns. Offers are linked to campaigns for the purposes of capturing the campaign linked to the offer that generated the purchase. Budgets, deliverables, and messages are linked to campaigns. Campaigns, events, deals, trade promotions, partners, event promotions, collections, and programs may be linked together under a Program to form a multi-faceted marketing object.

Integration

Campaigns and their related schedules are used to close the marketing loop. The campaign codes assigned to direct marketing and other activities are recorded by Oracle Sales Online, Oracle TeleSales, Oracle *i*Store and Oracle Order Management to link purchases back to the campaign that inspired them. These campaign codes can then be used to quantifiably determine the success of a campaign.

Prerequisites

None

Steps

Step	Required	Description
1. Set System Profiles	Optional	Set System Profile Options for email blast.
2. Verify and create Lookups for Campaigns and Programs	Yes	Verify system Lookups. Verify and modify extensible Lookups as necessary.
3. Set up and Run Concurrent Manager Programs	Yes	AMS Activate Schedule
4. Administration Setup	Yes	Setup parameters in the Administration tab.
5. Test Implementation of Campaigns and Programs	Yes	Perform tests to verify the implementation of Campaigns and Programs is correct.

1. Set System Profiles:
   a. Log into Forms as the implementation user and select the System Administrator Responsibility.
   b. Navigate to Functions > Profile > System.
   c. Enter the profile name in the Profile Field and click Find.
   d. Enter the appropriate value in the column corresponding to the level indicated.
   e. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
AMS : Email Header Banner	Optional	User	Image File and Path	Image for the email header of an email blast.
AMS : Email Footer Banner	Optional	User	Image File and Path	Image for the email footer of an email blast.

2. Verify and create Lookups for Campaigns and Programs:
   a. Log into Forms and select Oracle Marketing Administrator responsibility.

b. Navigate to Functions > Setups > Lookups.

c. Use View > Find to locate the individual keys.

Note: System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for Lookups and their types, values and meanings.

Key	Type	Values	Meanings
AMS_ ACCESS_ TYPE	System	Group User	Group User
AMS_ CAMPAIGN_ SCHEDULE_STATUS	System	Active Archived Available Cancelled Closed Completed Denied_BA New On_Hold Submitted_ BA	Active Archived Available Cancelled Closed Completed Denied Budget Approval New Active, but locked Pending Budget Approval

Key	Type	Values	Meanings
AMS_ CAMPAIGN_ STATUS	System	Active	Active
		Archived	Archived
		Available	Available
		Cancelled	Cancelled
		Closed	Closed
		Completed	Completed
		Denied_BA	Denied Budget Approval
		Denied_TA	Denied Theme Approval
		New	New
		On_Hold	Active, but locked
		Planning	Planned
		Submitted_Budget Approval	Submitted for Budget Approval
		Submitted_Theme Approval	Submitted for Theme Approval
AMS_ CAMPAIGN_ PURPOSE	Extensible	Awareness	Awareness
		Lead	Lead Generation
		Lead_ Maturation	Lead Maturation
		Sales_ Readiness	Sales Readiness
AMS_ CONTACT_ POINT_ TYPE	Extensible	Address	Address
		Email	Email
		Fax	Fax
		Inbound_ script	Inbound Script
		Outbound_ script	Outbound Script
		Phone	Phone
		Website	Website
AMS_ CONTENT_ TYPE	Extensible	HTML	HTML
		Text	Text
			Used for email schedules

Key	Type	Values	Meanings
AMS_ MASTER_ OBJECT_ TYPE	System	Camp CSCH EONE EVEH	Campaign Campaign Schedule One-Off Event Event
AMS_ MEDIA_ TYPE	System	Broadcast Deal Direct_Marketing Events Internet In_Store Public_Relations Trade_Promotion	Advertising Deal Direct Marketing Events Web Marketing In Store Press and Analyst Relations Trade Promotions
AMS_ PRIORITY	System	Fast_Track High Standard	Fast Track High Standard
AMS_ PROGRAM_ OBJECTIVE	User	User Defined	
AMS_ PROGRAM_ STATUS	System	Active Archived Cancelled Completed New On_Hold	Active Archived Cancelled Completed New Active, but locked
AMS_ ROLLUP_ TYPE	Extensible	Coll Deal ECAM EVCAM Partner RCAM TRDP	Collection Deal Campaign Event Promotions Partner Program Trade Promotion
AMS_ SCHEDULE_ OBJECTIVE	User	User Defined	

Key	Type	Values	Meanings
AMS_ TRIGGER_ CHK_ METRIC_ TYPE	System	Actual Forecast	Actual Value Forecast Value
AMS_ TRIGGER_ CHK_ TYPE	System	DIWB Metric Static_Value	Workbook Metric Static Value
AMS_ TRIGGER_ FREQUENCY_TYPE	System	Daily Hourly Monthly None Quarterly Weekly Yearly	The frequency of trigger checking
AMS_ TRIGGER_ TYPE	System	Metric_Metric Metric_Value Metric_ Workbook	Metric to Metric type trigger Metric to Value type trigger Metric to Workbook type trigger
AMS_CAMP_ RELATED_ EVENT	System	EONE EVEH EVEO	One-Off Event Event Event Schedule

3. Set up and Run Concurrent Manager Programs:
   a. Switch responsibility to Oracle Marketing Administrator.
   b. Navigate to Applications > Functions > Setups > Concurrent Requests.
   c. Click Submit a New Request.

See the table below for concurrent manager programs and their descriptions.

Concurrent Manager	Required	Description
AMS Activate Schedule	Optional	This will pick up all the Campaign Schedules which are in Available status and for which the start date has passed and its Campaign is active and make the Schedule Active.

Concurrent Manager	Required	Description
Workflow Background Process	Optional	In order to implement triggers, Workflow Background Process must be run for the item type OMO Triggers. Note that System Administrator (or any other user running this program), will require the proper JTF resource and be added to the Fulfillment Server Group in order to send email through triggers.

4. Administration Setup:
   a. Log into Marketing Online.
   b. Navigate to Administration > Marketing.
   c. Make the following selections, entering information as it pertains to Campaigns and Programs:

Component	Item	Choices	Effect
General	Marketing Medium	User Created	Create the marketing mediums that will be used in campaign schedules and relate each to the appropriate activity. Depending on the Activity type and the Activity used by the campaign schedule, these marketing mediums will populate the LOV in the campaign schedules page.
General	Metric	User created and seeded	Create the metrics that will be used for tracking campaigns and campaign schedules. These metrics will be available in the LOV of campaigns and campaign schedules. See Creating Metrics.

Note: If planning to use event type schedules with Campaigns, complete the implementation steps for Events.

5. Test Implementation of Campaigns and Programs:
   a. Log into Marketing Online.
   b. On create campaign page, verify that LOVs are present and that defaults (Currency, Owner's Name, for example) are displayed.

c. Create a campaign which has all items on the Side Navigation Menu available and click through each item verifying that each page displays correctly.

Note: If the organization is implementing One to One Fulfillment, ensure that users: (a) have JTF_FM_ADMIN role assigned to them, and (b) are assigned to the Fulfillment Resource Group. See User Setup for more information.

Note: Please see Implementing the Fulfillment server to utilize Oracle One to One Fulfillment for email direct marketing campaigns.

5.3 Implement Budgets

Budgets are used extensively within Marketing Online to supply funds for campaigns, events, offers, and other marketing objects. When funds are requested, a set of approval rules and workflows are set into motion. Budget funds are released for marketing objects only after approvals are received.

Implementing Budgets involves four different areas: Budgets, Budget Sourcing, Partner Budgets, and Generating Accounts.

Use

Budgets are integrated with Campaigns and Events and other marketing objects that require funding. Approval rules determine the budget approval process and direct the approval workflow.

Integration

Budgets, when Trade Management is implemented, are integrated with GL for the purposes of Sales Expense accounts and Accrual Liability accounts.

Prerequisites

None

Steps

Step	Required	Description
1. Set System Profiles	Yes	Specify profile information
2. Verify and create Lookups for Budgets	Yes	Verify and Create Lookups for Budgets.
3. Set up and Run Concurrent Manager Programs	Yes	Set up Concurrent Manager Programs for Budgets.
4. Administration Setup	Yes	Set up parameters in the Administration Tab.
5. Generating Accounts	Optional	Set up accounts for Budgets and Claims.
5. Test Implementation of Budgets	Yes	Perform tests to verify the implementation of Budgets is correct.

1. Set System Profiles:
   a. Log into Forms as the implementation user and select the System Administrator Responsibility.
   b. Navigate to Functions > Profile > System.
   c. Enter the profile name in the Profile Field and click Find.
   d. Enter the appropriate value in the column corresponding to the level indicated.
   e. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
AMS: Show GL Accounts On Screen	Yes	User	Yes/No	Default is Yes. If Yes is selected the Sales/ Expense Account field and the Accrual Liability Account field appear in the Budget Details page.
AMS: Source from Parent Object	Yes	Site	Yes/No	Yes indicates that campaign and event schedules may only source from their parent objects. No indicates that schedules may source funds directly from a budget.

Option	Required	Level	Setting	Effect/Limitation
AMS: Allow Recalculation of Committed Budget	Optional	All	Yes/No	When set to Yes will perform recalculation for commitment of offers.
AMS: Default Period in Days for recalculating committed budget	Optional	All	Number of Days	The number of days between performing committed budget calculations.
AMS: Allow committed budget to exceed total budget	Optional	All	Yes/No	When set to Yes, the committed amount for a budget may exceed its total budget amount.

2. Verify and Create Lookups for Budgets:
   a. Log into Forms and select Oracle Marketing Administrator responsibility.
   b. Navigate to Functions > Setups > Lookups.
   c. Use View > Find to locate the individual keys.

   Note: System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for Lookups and their types, values and meanings.

Key	Type	Values	Meanings
AMS_FUND_ STATUS	System	Active Archived Cancelled Closed Draft On_Hold Pending Rejected	Active Archived Cancelled Closed Draft On Hold Pending Approval Rejected
AMS_FUND_ TYPE	System	Fixed Fully_ Accrued	Fixed Fully Accrued.
AMS_ ACCRUAL_ BASIS	System	Customer Sales	Custom Sales (Required for Trade Management)
AMS_QP_ ARITHMETIC_ OPERATOR	System	% Amt Lumpsum Newprice	Percent Amount Lumpsum NewPrice
AMS_ UTILIZATION_ TYPE	System	Accrual Adjustment Sales_ Accrual Utilized	Accrual Adjustment Sales Accrual (refers to the salesperson) Utilized
AMS_ TRANSFER_ TYPE	Extensible	Release Reserve Transfer Request Utilized	Release Reserve Transfer Request Utilized

Key	Type	Values	Meanings
AMS_FUND_ SOURCE	System	CAMP EVEH EVEO FUND CSCH DELV EONE OFFR PTNR OPTN VEND USER	Campaign Event Event Schedule Budget Campaign Schedule Deliverable One Off Event Offer Partner Other Partner Vendor Person
AMS_ PARTNER_ HOLDING_ TYPE (Holding Owner)	System	PTNR VEND	Partner Vendor Only used when Partners Online is implemented.
AMS_ TRANSFER_ REASON	User	Sourcing	Initial Sourcing
AMS_ BUDGET_ SOURCE_ STATUS	System	Approved Closed New Pending Rejected	Approved Closed Planning Pending Rejected
AMS_OBJECT_ CLASS	System	Order Order_line Invoice	Order Order Line Invoice
AMS_ PRODUCT_ LEVEL	System	Product Family	Product Product Family

Key	Type	Values	Meanings
AMS_VALUE_ LIMIT	Extensible	Balance Committed Paid Planned Utilized	Balance Committed Paid Planned Utilized
AMS_ ADJUSTMENT_ TYPE	Extensible	Decrease_ Committed Decrease_ Comm_ Earned Decrease_ Earned Standard	Decrease Committed Amount Decrease Committed and Earned Amounts Decrease Earned Amount Increase Earned Amount

3. Set up Concurrent Manager Programs:
   a. Switch responsibility to Oracle Marketing Administrator.
   b. Navigate to Applications > Functions > Setups > Concurrent Requests.
   c. Click Submit a New Request.

See the table below for concurrent managers and descriptions.

Concurrent Manager	Required	Description
AMS-TM: Funds Accrual Engine	Yes	Ability to calculate budget utilization and earnings based on ship confirmed orders (provided the offer's phase is set to 'Ship', else the accruals will be calculated at the phase the offer is applied). In case of Fully Accrued type of Budgets with accrue to is 'customer', Budget, Committed and Earned columns are to be updated with the accrued amount. But in case of budgets with accrue to 'Sales', only Budget column will have to be updated. Committed and Earned should not be populated. This allows users to transfer money from Fully accrued budget to any other Fixed Budgets. If max cap is specified against the Fully accrued budget, the budget can be accumulated only to the level of max cap. Parameters: None.

Concurrent Manager	Required	Description
AMS-TM Utilize Lumpsum Offers	Yes	A user initiated background process that will account budget utilizations against lumpsum offer whenever the offer start date arrives rather than on offer approved or created date. In case when the Offer is active on the date when Offer was created, then the budget utilization will be updated immediately.
AMS-TM: Release Committed Budget Amount After Grace Period	Yes	A budget has been committed for an offer or any other activity. The Activity or offer date has ended or the offer is going to be closed or canceled. There might be a situation that the budget has not been utilized completely. This feature can be implemented through a concurrent process that would return back the unused committed amount back to the sourcing budget. If there is a grace period, release of committed amount from a fixed type fund would take place whenever a offer is closed or canceled after the attainment of the grace period. Parameters: p_object_type (Object Type, for example, CAMP, OFFR, EVEH)
AMS-TM: Validate Budget Thresholds	Yes	Threshold Alert provides the feature to monitor over spending or under spending from time to time. The concurrent program performs the automatic process of verification and notifies the owner of the budget on over & under utilization. Parameters: None
AMS-TM: Import Territory Hierarchy	Yes	This concurrent program uploads the hierarchy data from jtf_territories to AMS schema to be able to perform budget allocation to that territory hierarchy. The concurrent program expects a hierarchy id meaning which particular hierarchy the user wants to import. Parameters: Hierarchy Id
AMS-TM: Perform Recalculated Commitment for Offers	No	Performs recalculation of committed budget for offers.

Note: These concurrent manager programs should be setup to run after use of Budgets has commenced. They should not be run at the time of implementation.

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4. Administration Setup:
   a. Log into Marketing Online.
   b. Navigate to Administration > Marketing.
   c. Make the following selections, entering information as it pertains to Budgets.

See the table below for Administration selections and their values.

Component	Item	Choices	Effect
Claim	System Parameter	Select a Set of Books from the LOV.	The set of books will be used for all functional-transactional currency conversion and posting to GL for all marketing objects. This should not be changed once implemented.
Claim	System Parameter	Post to GL Yes or No	If set to Yes general ledger accounting will be done for all budget adjustments and accruals.

5. Generation of Accounts.

   Oracle Marketing Online provides a Account Generator. If the default processes do not satisfy the organization's accounting requirements, you can use the Oracle Workflow Builder to customize the default Account Generator processes or add new processes if desired.

6. Test Implementation of Budgets:
   a. Create a fixed type budget and make it active.
   b. From a campaign, request funds from a budget.

5.4 Implement Events

The Event management module within Oracle Marketing provides the marketing professional the tools to plan for and execute on a variety of different types of events from the very simple to the very complex.

To support the rapid creation, definition and maintenance of a large number of similar events, the user can setup Events that define content, message and planning information. Against these Events, event schedules can be defined for various locations and times. Events can act as templates for event schedules.

An Event can be created as part of a marketing campaign, or be an independent.

Use

Events are integrated with Campaigns and Lists. Budgets, Deliverables, Messages, may be linked to Events. Events, Campaigns, and Programs may be linked together under a program to give an overall view of all marketing activities.

Integration

Events are integrated with Oracle TeleSales for the purposes of taking registrations and attendance for Event Schedules. Events are also integrated with Inventory and Pricing.

Prerequisites

None

Steps

Step	Required	Description
1. Set System Profiles	Yes	Enter various System Profile Options for Events.
2. Verify and Create Lookups for Events	Optional	Verify Lists of Values for Events.
3. Administration Setup	Yes	Set up parameters in the Administration tab.
4. Test Implementation of Events	Yes	Perform tests to verify the implementation of Events is correct.

1. Set System Profiles:
   a. Log into Forms as the Implementation User and select the System Administrator Responsibility.
   b. Navigate to Functions > Profile > System.
   c. Enter the profile name in the Profile Field and click Find.

d. Enter the appropriate value in the column corresponding to the level indicated.

e. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
AMS: Auto Register for Events upon cancellation	Yes	Site	Yes/No	This is used to determine if the attendee can be moved from the waiting list to registered status if a spot is available
AMS: Copy Event Details to Event Schedules	Yes	Site	Yes/No	This is used to allow details of parent Event to be copied to the schedule
AMS: Prefix to Registration Confirmation Code	Optional	Site	User Defined	Characters for the Event Registration Confirmation Code.
AMS HZ Dedupe Rule	Optional	Site	Yes/No	Indicates whether to use the TCA deduplication rules while performing event registration.

Note: The registration confirmation code holds a maximum of 30 characters. The code is created from two components: the profile AMS: Prefix to Registration Confirmation Code and the sequence number generated by the sequence ams_event_reg_confirmations. If the code exceeds 30 characters, users will receive an error: "character buffer too small" when registering.

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2. Verify and Create Lookups for Events.

a. Log into Forms and select Oracle Marketing Administrator responsibility.

b. Navigate to Functions > Setups > Lookups.

c. Use View > Find to locate the individual keys.

> **Note:** System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for Lookups and their types, values and meanings.

Key	Type	Values	Meanings
AMS_DELIVERY_MEDIA_TYPE	Extensible	I SEMINAR ON_SITE SEMINAR WEB	I Seminar On Site Seminar Web
AMS_EVENT_STATUS	System	Active Archived Available Cancelled Closed Completed Denied_BA Denied_TA New On_Hold Submitted_ BA Submitted_TA Planning	Active Archived Available Cancelled Closed Completed Denied Budget Approval Denied Concept Approval New Active, but locked Pending Budget Approval Pending Concept Approval Planning
AMS_EVENT_AGENDA_STATUS	System	Confirmed Unconfirmed	Confirmed Unconfirmed

Key	Type	Values	Meanings
AMS_EVENT_TYPE	Extensible	Briefing Conference Exhibition Hospitality Internal_Event Launch Seminar Speaking_ Engagement Sponsorship_Event Trade_Show Web_Seminar Workshop	Briefing Conference Exhibition Hospitality Internal Event Launch Seminar Speaking Engagement Sponsorship Trade Show Web Seminar Workshop
AMS_ CONTACT_ POINT_ TYPE	Extensible	Address Email Fax Inbound_ script Outbound_ script Phone Website	Address Email Fax In bound Script Outbound Script Phone Website
AMS_ MASTER_ OBJECT_ TYPE	System	Camp CSCH EONE EVEH	Campaign Campaign Schedule One-Off Event Event
AMS_ PRIORITY	System	Fast_Track High Standard	Fast Track High Standard
AMS_EVENT_SPEAKER_ STATUS	System	Booked Cancelled Confirmed Scheduled	Booked Cancelled Confirmed Scheduled

Key	Type	Values	Meanings
AMS_EVENT_STREAM_TYPE	System	A B C D	A B C D Track name
AMS_EVENT_WAITLIST_ACTION	System	First_Come_First	First Come First Served
AMS_EVENT_RESOURCE_TYPE	System	AMS_People	People
AMS_EVENT_REG_STATUS	System	Cancelled Enrolled Registered Targeted Waitlisted	Cancelled Enrolled Registered Targeted Waitlisted
AMS_EVENT_REG_SOURCE	System	Call_Center External On_Site Partner Web	Call Center External On Site Partner Web
AMS_EVENT_REG_CANCEL_REASON	System	Agenda_Change Cost Personal_Emergency Price_Change Sch_Conflict Speaker_Change Venue_Change Work_Emergency	Agenda Change Cost Personal Emergency Price Change Scheduling Conflict Speaker Change Venue Change Work Emergency
AMS_EVENT_PAYMENT_STATUS	System	Comp Free Invoiced Paid Refunded	Complimentary Free Invoiced Paid Refunded

Key	Type	Values	Meanings
AMS_EVENT_LEVEL	System	Main Sub	Main Sub
AMS_EVENT_FULFILL_ ON	System	On_Cancel On_Enroll On_Reg	On Cancellation On Enrollment On Registration
AMS_EVENT_DAY	System	Five Four Three Two One	5 4 3 2 1
AMS_EVENT_CERT_ CREDIT_ TYPE	System	General Seed	General Seed
AMS_EVENT_CANCEL_ REASON	System	Disaster Insufficient_Reg Postponed Schedule_Conflict Speaker_ Unavailable Venue_Unavailable	Natural Disaster Insufficient Registration Postponed Schedule Conflict Speaker not available Venue not available
AMS_EVENT_ ATTENDANCE_FAILURE	System	Agenda_Change Disaster Personal_Emergency Schedule_Conflict Speaker_Change Venue_Change Work_Emergency	Agenda Change Natural Disaster Personal Emergency Schedule Conflict Speaker Change Venue Change Work Emergency
AMS_EVENT_ PURPOSE	User	Organization defined values	Purpose for the event.
AMS_EVENT_ SCHEDULE_ OBJECTIVE	User	Organization defined values	Objective for the event.

3. Set up Concurrent Manager Programs:

a. Switch responsibility to Oracle Marketing Administrator.

b. Navigate to Applications > Functions > Setups > Concurrent Requests.

c. Click Submit a New Request.

See the table below for concurrent managers and descriptions.

Concurrent Manager	Required	Description
Activate Event Schedules	Optional	This will pick up all the Event Schedules which are in Available status and for which the start date has passed and its Event is active and make the Schedule Active.

4. Administration Setup:

   a. Log into Marketing Online.

   b. Navigate to Administration > Marketing.

   c. Make the following selections, entering information as it pertains to Events.

See the table below for Administration selections and their values.

Component	Item	Choices	Effect
General	Venues	User Created	Create the venues that will be used in event schedules.
General	Metric	User created and seeded	Create the metrics that will be used for tracking events and event schedules. These metrics will be available in the LOV for the Metrics item on the Side Navigation Menu of events and event schedules. See Creating Metrics.

5. Test Implementation of Events.

   a. Log into Marketing Online.

   b. On the Create Event page, check to see that LOVs are present and that defaults (Currency, Owner's Name) are displayed.

   c. Create an Event, Event Schedule and a One-Off Event. Check items on the Side Navigation Menu, and click through each item.

5.5 Implement Offers

Offers come in many different varieties and may be associated with different marketing objects as well as existing on their own.

Use

Offers are generally associated with campaigns and campaign schedules. An offer must be associated with campaign in order to be associated with a related campaign offer. Claims may be recorded against offers. Offers may be sourced from a budget. When an offer is utilized, the sourced budget's utilization is updated.

Integration

Offers depend on Advanced Pricing, Inventory and utilized by Order Quoting-Forms or Order Management.

Offers are used by Oracle Sales Online and Oracle TeleSales to book opportunities.

Prerequisites

Oracle Advanced Pricing, Oracle Inventory, and either Oracle Quoting-Forms or Oracle Order Management must be implemented prior to implementing Offers in Oracle Marketing Online. Refer to the individual implementation guides.

Steps

Step	Required	Description
1. Set System Profiles	Yes	Specify profile information.
2. Verify and create Lookups for Offers	Yes	Verify and create Lookups.
3. Test Implementation of Offers	Yes	Perform tests to verify the implementation of Offers is correct.

1. Set System Profiles:
   a. Log into Forms as the implementation user and select the System Administrator Responsibility.
   b. Navigate to Functions > Profile > System.
   c. Enter the profile name in the Profile Field and click Find.

d. Enter the appropriate value in the column corresponding to the level indicated.

e. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
AMS: Relationship Type for Buying Group	Yes	Site	Any valid relationship type created in TCA	Used to establish a hierarchical group of customers in TCA. For example, if value is set to subsidiaries then all parties who share this relationship will be part of a buying group. These are used as qualification criteria for offers.
QP: Accrual UOM Class	Yes	Site	UOM Classes as set up in Inventory	Used by accrual offers. All accrual units will fall under this UOM class (for example, frequent flyer miles).
QP: Item Validation Organization	Yes	Respon sibility	Inventory Organizations as set up in Inventory	Offers can be defined only for those products which will be available in the specified organization. Required for all offers.
QP: Source System Code	Yes	Respon sibility	Possible Source Systems that can define offers	Offers created using this relationship are tagged with this system source code and will be used to determine update privileges of offers within the pricing module.
AMS: Choose Date Qualifier Regions	Yes	Site	Show All Show Header Dates Show only Date Qualifiers	This profile is used in the Trade Deal Offer User Interface. Based on the setting, the user may either enter date qualifiers or Header Dates or both.
AMS Default Bucket for discount rules	Yes	Site	Values from Advanced Pricing Lookup PRICING_ GROUP_ SEQUENCE	The value set here will be used as the default value for buckets in the discount rules.

Option	Required	Level	Setting	Effect/Limitation
AMS: Default Phase for Line level discounts	Yes	Site	Available values are derived from event phase setup in Advanced Pricing	This value will be used as the default value for phase for all discount rules with a discount level of Line.
AMS: Default Phase for Line Group level discounts	Yes	Site	Available values are derived from event phase setup in Advanced Pricing	This value will be used as the default value for phase for all discount rules with a discount level of Group of Lines.
AMS: Default Phase for Order level discounts	Yes	Site	Available values are derived from event phase setup in Advanced Pricing	This value will be used as the default value for phase for all discount rules with a discount level of Order.
AMS: Default value for Print on Invoice Flag	Yes	Site	Yes/No	Used as a default for all discount rules.
AMS: Default value for Product Preference	Yes	Site	User Defined	Used as a default for all discount rules.
AMS: Default Offer Formula	Optional	Site	Available pricing formulas in Advanced Pricing	This option handles discount rules for product categories when the Unit of Measure is not specified.

2. Verify and Create Lookups for Offers:
   a. Log into Forms and select Oracle Marketing Administrator responsibility.
   b. Navigate to Functions > Setups > Lookups.
   c. Use View > Find to locate the individual keys.

Note: System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for Lookups and their types, values and meanings.

Key	Type	Values	Meanings
AMS_OFFER_ DEAL_ CUSTOMER_ TYPES	Extensible	Buyer Customer List Segment	Buyer Group Customer List Segment
AMS_ LUMPSUM_ DISTRIBUTION_ TYPE	System	% Amt Qty	Percent Amount Quantity
AMS_OFFER_ LUMPSUM_ PAYMENT	System	Accrue Check	Accrue Issue Check
AMS_OFFER_LUMP_ CUST_ TYPES	System	Buyer Customer	Buyer Customer
AMS_OFFER_ STATUS	System	Active Closed Draft Rejected Closed Pending Pending_Active Archived Cancelled Completed Terminated Onhold	Active Closed Draft Budget Rejected Closed Pending budget approval Pending Active Archived Cancelled Completed Terminated On hold

Key	Type	Values	Meanings
AMS_OFFER_ TYPE	System	OID Lumpsum Order Accrual Off_Invoice Deal Terms	Promotional Goods Lump sum Order value Accruals Off Invoice Trade Deal Terms Upgrade
AMS_QP_ ARITHMETIC _ OPERATOR	System	% Amt Lumpsum Newprice	Percent Amount Lump sum New Price
AMS_QP_ VOLUME_ TYPE	System	Pricing_Attribute10 Pricing_Attribute12	Quantity Amount

3. Test implementation of Offers.
   a. Navigate to Products > Offers.
   b. Create an Offer. The status field should be populated with a LOV.
   c. The Advanced Options item on the Side Navigation Menu should display default values for Pricing Bucket, Incompatibility Group, and phase.
   d. Select Market Eligibility on the Side Navigation Menu. Select Customer Group in marketing context field and buying group from the context attribute field. Click Go from the attribute value field. This should display a set of customers.

5.6 Implement List

Lists are used extensively by Oracle Marketing Online and throughout many parts of the CRM Suite. Lists contain information on prospects, customers, and event registrants. Lists may be sourced internally, from the Trading Community Architecture database (TCA) or externally either through list import or by use of Oracle Discoverer.

Lists are static in nature. Lists are comprised of the actual information which differs from a Segment which is a query definition used to generate a list. Segments are dynamic in that using a Segment can potentially generate a different set of records each time it is used.

Use

Lists are used with Campaign Schedules to execute a campaign action on a particular set of prospects or customers. They are used with Events to create invitation lists. They are used with Offers to limit Offers to a particular marketing target. See the *Oracle Marketing Online Concepts and Procedures Guide* for more information of the use and creation of Lists.

Integration

Oracle Discoverer's integration with Oracle Marketing Online is crucial to working with Lists. Lists are generated from both internal and external sources using Discoverer. Discoverer also makes it possible to generate very defined lists without the knowledge of database commands.

Other CRM products, such as Oracle Partners Online and Oracle TeleSales make use of Lists.

Prerequisites

None

Steps

Step	Required	Description
1. Set System Profiles	Yes	Enter various System Profile Options for List.
2. Verify and create Lookups for List	Yes	Verify Lists of Values for List.
3. Set up Discoverer	Yes	Sets up Oracle Discoverer for access from within Oracle Marketing Online.
4. Setup and Run Concurrent Manager Programs	Optional	Sets up Concurrent Manager programs required by List.
5. Test Implementation of List	Yes	Check for successful implementation of List.

1. Set System Profiles:
   a. Log into Forms and select System Administrator responsibility.

b. Log into Forms as the implementation user and select the System Administrator Responsibility.

c. Navigate to Functions > Profile > System.

d. Enter the profile name in the Profile Field and click Find.

e. Enter the appropriate value in the column corresponding to the level indicated.

f. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
ICX: Discoverer End User Layer	Yes	Site	User Defined	EUL prefix for Discoverer, usually EUL4
ICX: Discoverer Launcher	Yes	Site	User Defined	URL to launch Discoverer Web version
ICX: Discoverer Viewer Launcher	Yes	Site	User Defined	URL to launch Discoverer viewer
ICX: Discoverer Use Viewer	Optional	Site	Yes/No	Whether to use viewer instead Web Discoverer. Defaulted to No.
AMS: List Workbook B2C Marketing	Optional	Site	User Defined	Workbook name convention prefix for B2C workbooks. The default is B2C. A blank convention prefix will result in more workbooks than you need in the LOV.
AMS: List Workbook B2B Marketing	Optional	Site	User Defined	Workbook name convention prefix for B2B workbooks. The default is B2B. A blank convention prefix will result in more workbooks than you need in the LOV.

2. Verify and Create Lookups for List:

a. Log into Forms and select Oracle Marketing Administrator responsibility.

b. Navigate to Functions > Setups > Lookups.

c. Use View > Find to locate the individual keys.

Note: System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for Lookups and their types, values and meanings.

Key	Type	Seeded Values	Meanings
AMS_LIST_ ACT_TYPE	User	Employee List List	Target group list selection type
AMS_LIST_ DEDUP_ TYPE	User	List Import Consumers Import Organizations	Type of Deduplication Rules to be applied
AMS_LIST_GENERATION_ TYPE	System	Incremental	New entries added, old entries not deleted, entries not updated
		Standard	All old entries deleted, new entries added
		Update	New entries added, old entries not meeting criteria deleted, entry information updated
		Update No Purge	New entries added, old entries retained, entry information updated
AMS_LIST_ ROW_ SELECT_ TYPE	System	Nth Record Random Standard	How to select rows during list generation. Standard is top down selection.
AMS_LIST_ SEGMENT_ STATUS	User	Archived Available Cancelled Draft Expired	Archived Available Cancelled Draft Expired
AMS_LIST_ SEGMENT_ TYPE	System	Workbook SQL	Two types of segments supported. Based on a Discoverer workbook or an SQL statement.

Key	Type	Seeded Values	Meanings
AMS_LIST_ SELECTION_ ACTION	System	Include Exclude Intersect	How each selection is added to the list. Exclude means that all entries that exist in the excluded list are removed from the current list. Intersect causes the current list to become a list of only those entries which are on the intersected list and the current list.
AMS_LIST_ SELECTION_ TYPE	System	Segment Workbook Import List List SQL	Segment Workbook Import List List SQL
AMS_LIST_ STATUS	System	Archived Available Cancelled Draft Executed Executing Generating Locked New Pending Reserved Scheduled Validated Validating	Archived Available Cancelled Draft Executed Executing Generating Locked New Pending Reserved Scheduled Validated Validating
AMS_LIST_ TYPE	System	Manual List Standard List Suppression List Target Group	List of possible list types. Note where these appear in the program.

3. Set up Discoverer.

   Obtain the *Oracle iAS9i Installation Guide* and the *iDS9i Installation Guide*. Oracle iAS9i must be patched to 1.0.2.2 or higher. Use these guides to perform the following. See Appendix L for more information.

   a. Create the EUL.

   b. Import the EUL.

   c. Set up Discoverer ICX.

4. Set up and Run Concurrent Manager Programs:

   a. Switch responsibility to Oracle Marketing Administrator

   b. Navigate to Applications > Functions > Setups > Concurrent Requests.

   c. Click Submit a New Request.

See the table below for concurrent manager programs and their descriptions.

Concurrent Manager	**Required**	**Description**
AMS: Refresh Party Market Segments	Optional	Generates a list of parties in the segment. This program also updates the size information for all segments so a history of segment sizes may be maintained.
AMS: Generate Suppression list	Optional	Updates and maintains organization defined suppression lists. This is in addition to seeded suppression lists.
AMS: Purge Target Group	Optional	After a target group has been generated and used, this program lets a user purge the list entries.
AMS: Purge Imported List	Optional	During the import process, the user may specify an expiration date or number of uses for a list. This program removes those entries whose expiration date has passed or number of uses reached. Optional Parameter: force_purge_flag. This parameter indicates whether to purge a record regardless of the associated campaign status. The default value is No.

5. Test Implementation of List.

a. Log into Marketing Online and make sure you can successfully display all subtabs under menus.

b. Make sure that Oracle Discoverer launches with a single signon.

Known Issues or Conflicts

If a Discoverer generated workbook SQL statement has a "Group By" parameter in it, list generation may fail.

5.7 Implement List Import

List Import is a feature of Oracle Marketing Online which facilitates importing lists of prospects and their related information from outside sources. These may include rented or purchased mailing lists, mailing lists from merged or acquired organizations, or mailing lists provided by internal or external sales people.

List Import is also a gateway to an organization's Trading Community Architecture (TCA) database. Rented lists are held on a temporary basis while purchased or personal lists may be imported and added directly to the TCA tables. See TCA Best Practices White Paper, available from Metalink, for a complete description of TCA.

Use

List Import is integral to other list functionality within Oracle Marketing Online. A list may be created directly from the records imported by List Import or they may be held temporarily in the import tables. See *Oracle Marketing Online Concepts and Procedures Guide* for complete information on List functionality.

Integration

Oracle Marketing Online uses the export process to pass lead information to Oracle Sales Online and to TCA.

Oracle Discoverer may be used during the import process to preview the staged data (in a temporary table). The Discoverer server must be set up so that the Discoverer single signon may be used to launch the Discoverer viewer. See the *Oracle Discoverer Implementation Guide* for more information.

The TCA word replacement system is used for word replacement while performing a deduplication check. Please use the TCA word replacement form to define new word replacements.

Please see Word Replacements in TCA, in the Administration section, for more information.

List Import Types

Oracle Marketing Online can perform three types of imports: Organizations, persons or addresses, Event registrations, and Leads import.

Organizations, Persons or Addresses

Imports the B2B or B2C type of data. The data is imported to both marketing and TCA tables based on the option selected, like preview or import on the list import review page. Preview option loads the data only to the OMO tables (AMS_IMP_LIST_HEADERS_ALL, AMS_IMP_SOURCE_LINES, AMS_PARTY_SOURCES) and provides an option the check the data before importing it into TCA. Import loads the data into the TCA tables such as HZ_PARTIES, HZ_LOCATIONS, HZ_PARTY_SITES, HZ_CONTACT_POINTS, and HZ_ORG_CONTACTS.

Event Registration

OMO event registration can also be executed from the list import. This imports data to the marketing tables and then does the event registration.

Lead Import

Oracle Sales Online lead import can also be done from list import. This process imports the data to the AS_IMPORT_INTERFACE table and then processes all the leads. It also populates TCA tables with the data.

Existence Checking

If implemented, existence checking checks the import record against existing records in TCA according to a schema outlined in Appendix H. Checks are performed on the Customer Name, Address, and Person contacts in this order. No existence checking is performed against Phone, Email, Web and Fax information. Implementing Existence Checking will reduce the number of duplicate records saved into TCA.

Prerequisites

SQL Loader, which is required to import files from the server location.

Steps

Step	Required	Description
1. Create the Bin Directory	Yes	Creates a location for the SQL Loader control file.

Step	Required	Description
2. Set System Profiles	Yes	Enter the paths for the Data File and Control File profiles.
3. Set TCA Existence Checking System Profile Options	Optional	Enter information in these System Profile Options if implementing TCA Existence Checking.
4. Verify and Create Lookups for List Import	Optional	Verify Lookups for List Import
5. Run NFS Mount	Optional	Run NSF Mount if the concurrent manager server is different.
6. Administration Setup	Optional	Set up Administration settings, including Deduplication Rules.
7. Test Implementation of List Import	Yes	Perform tests to verify the implementation of List Import is correct.

1. Create the Bin Directory.

   If a bin directory is not already present, create one under PRODUCT TOP ($AMS_TOP) for the SQL Loader control file. This directory must have Read, Write and Execute privileges. This step is required to import data from a data file located on the server.

2. Set System Profiles:

   a. Log into Forms and select System Administrator responsibility.

   b. Log into Forms as the implementation user and select the System Administrator Responsibility.

   c. Navigate to Functions > Profile > System.

   d. Enter the profile name in the Profile Field and click Find. You can reduce the number of profiles found by entering first few letters of a profile name followed by the percent sign (%) as a wildcard.

   e. Enter the appropriate value in the column corresponding to the level indicated.

   f. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
AMS IMPORT CONTROL FILE PATH	Yes	Site	Control File Location	Enter the path for the bin directory: ($AMS_TOP/bin) Improper setup will cause the server side import to fail.
AMS IMPORT DATA FILE PATH	Yes	Site	Data File Location	Enter the path for the data file location Improper setup will cause the server side import to fail.
AMS HZ DEDUPE RULE	Optional	Site	Yes/No	Indicates whether deduplication rules are in effect for records placed into TCA.

3. Set TCA Existence Checking System Profile Options.

See the table below for these options and their values.

Option	Required	Level	Setting	Effect/Limitation
HZ: Key Word Count	Optional	Site	Number of words	This number determines how many words in the customer name are used to generate the keys.
HZ: Address Key Length	Optional	Site	Length of the Address	This determines the length of Address key.
HZ: Postal Code Key Length	Optional	Site	Length of the Postal Code	This determines the length of Postal Code key.

4. Verify and Create Lookups for List Import:

   a. Log into Forms and select Oracle Marketing Administrator responsibility.

   b. Navigate to Functions > Setups > Lookups.

   c. Use View > Find to locate the individual keys.

   Note: System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for LOVs and their types, values and meanings.

Key	Type	Values	Meanings
AMS_ IMPORT_ TYPE	System	Customer	Organizations, Persons and TCA data.
		Event	Event registration data.
		Lead	Leads data.
AMS_ IMPORT_ STATUS	System	New	New Import
		Staged	Entries are imported and available for viewing
		Scheduled	Import is setup and ready to be completed at the scheduled time.
		Completed	Import completed.
		Purged	Imported entries have been purged from the Marketing Import Table.
		Cancelled	The list import has been cancelled and may not be reactivated.
		Error	An error occurred during list import.

5. Run NFS Mount.

   If the concurrent manager server is different from the server where your data is located and you want to import data from the server, run NFS Mount. This ensures that your data file directory is mounted to the concurrent manager server.

6. Administration Setup:

   a. Log into Marketing Online.

   b. Navigate to Administration > Marketing > Audience > Deduplication Rules.

   c. Enter a Rule Name, Description and select a Type from: Import Consumers, Import Organizations or List. The Type determines when the rules will be applied.

   d. Click Update.

   e. Click the link of the rule just created.

   f. Select a table column for this rule to check for duplicates.

   g. Click Update. Select additional columns if required.

h. Click the Deduplication Rules link to return to the Rules List.

7. Test Implementation of List Import

   a. Verify that the bin directory is available under $AMS_TOP and it has Read, Write and Execute permissions. After running a test import, the control file (*.ctl) will be located in this directory.

   b. Control file profile AMS IMPORT CONTROL FILE PATH is set to the proper value.

   c. Data file profile AMS IMPORT DATA FILE PATH is set to the proper value.

   d. If the concurrent manager server is different from the server where your data is location and you want to import data from the server, run NFS Mount. This ensures that your data file director is mounted to the concurrent manager server.

Known Issues or Conflicts

Performance may be slow if using complicated deduplication rules are used.

If importing more than 2000 records, the import file should be located on the server.

5.8 Implement Data Mining

Data mining in Oracle Marketing Online is used to analyze the performance of existing marketing activities, the results of this analysis can be used to create lists for use in future marketing initiatives.

Use

Oracle Marketing Online uses data mining technology to “learn” customer propensities based on their characteristics and past actions. Oracle Marketing Online uses this knowledge to make behavior predictions and generate lists based on those predictions. The generated lists are then used by marketing activities, including campaign schedules and event schedules, to improve customer targeting. Discoverer Workbooks may be created that select customers based on their data mining information.

Integration

Data mining uses the Trading Community Architecture (TCA), Interactions History, Accounts Receivable, Oracle Quoting-Forms, and Field Service as data sources for customer information.

Prerequisites

Implement Oracle 9*i* Data Mining (ODM).

Steps

Step	Required	Description
1. Set up the ODM Property File	Yes	Create a file with property and value pairs to be used by the data mining Java program. The file should be created in a location accessible to the Java Concurrent Program.
2. Set up ODM Data Input	Yes	The data source for ODM is in CRM tables. If the ODM schema and CRM schema are in different instances, a database link must be created to provide a path for ODM to fetch data from CRM. Data input views are used by the data mining engine to fetch data for model building and scoring.
3. Set up the Link from CRM to ODM	Yes	If the ODM output schema is in a different instance from the CRM schema, then a database link from the CRM to the ODM instance is needed to link the two schemas. CRM needs to access the ODM output schema to fetch scoring run results for processing. The setup includes setting values for the profile options AMS: Data Mining DB Link and AMS: Data Mining Engine Output Schema.
4. Set Up Concurrent Manager Environment	Yes	The data mining Java Concurrent Programs require ODM Java classes which are not installed by the standard CRM installation, so they must be manually configured in the CLASSPATH concurrent manager program. CLASSPATH is an environment variable containing directory information for java classes.
5. Set System Profiles	Yes	Specify profile information.
6. Set Up Concurrent Manager Programs	Yes	Workflow Background Engine AMS Expire Data Mining Models AMS Update Data Mining Models
7. Verify and create Lookups for Data Mining	Optional	Verify Lookups for Data Mining.

Step	Required	Description
8. Test Implementation of Data Mining	Yes	Perform tests to verify the implementation of Data Mining is correct.

1. Set up the ODM Property File.

   Create and save a new property file with the following entries:

   - miningServer.url=jdbc:oracle:thin:@<server>:<port>:<sid>
   - miningServer.userName=<ODM username>
   - miningServer.password=<ODM password>
   - discretization.binnedBuildDataSchemaName=<schema used for binning data>
   - applyInput.schemaName=<schema of apply input data>
   - applyOutputResult.schemaName=<schema of apply output>
   - InputData.DBLinkName=<ODM to CRM Database Link>

   The file should not include the bullet points or any additional lines. The entries are described as:

   - miningServer.url – the JDBC connection string for a thin client connection.
   - miningServer.userName – the ODM username to use to connect to the data mining server.
   - miningServer.password – the password used for the ODM user.
   - discretization.binnedBuildDataSchemaName – the database schema in which the data mining engine writes binned data during the model building process.
   - applyInput.schemaName – the database schema in which the input data for scoring is located.
   - applyOutputResult.schemaName – the database schema in which the scoring output results are written.
   - InputData.DBLinkName - The database link used to select input data from the CRM database to the ODM database.

   After creating the property file, the profile option “AMS: Data Mining Engine Program Property File” must be set to the location of the file.

2. Set up ODM Data Input.

   If the ODM schema and CRM schema are in different database instances, create a database link in the ODM application schema to reference the CRM schema. The database link is needed for ODM to extract input data from the OMO data sources.

3. Set up the Link from CRM to ODM:

   Create a Database Link in the CRM schema, which connects to the output schema of the ODM database. After creating the database link, set the values for the profile options: “AMS: Data Mining DB Link” and “AMS: Data Mining Engine Output Schema” (see Step 5 below).

4. Set up Concurrent Manager Environment:

   Configure the CRM mid-tier CLASSPATH. The ODM APIs depend on 9i JDBC drivers and are included in jar files installed by ODM. The jar files can be found under $ORACLE_HOME/dmt/jlib.

   The following entries must be added to the CRM mid-tier CLASSPATH:

   - odmapi.jar
   - oputil.jar

   The CLASSPATH can be set in the file $APPL_TOP/admin/adovars.env. In addition, modify the file to use JDK 2 by setting the value for the environment variable APPLJRE to indicate the executable of the runtime engine, usually <JDK 2 Directory>/bin/java. If APPLJRE does not exist, create an entry for it.

5. Set System Profiles:

   a. Log into Forms and select System Administrator responsibility.
   b. Log into Forms as the implementation user and select the System Administrator Responsibility.
   c. Navigate to Functions > Profile > System.
   d. Enter the profile name in the Profile Field and click Find.
   e. Enter the appropriate value in the column corresponding to the level indicated.
   f. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
AMS: Marketing to ODM Database Link	Yes	Site	All database links in the database.	The scoring run result processing program will use the db link to fetch results.
AMS: Data Mining Engine Output Schema	Yes	Site	Free form text corresponding to the scoring output schema specified in Step 3.	The scoring run result processing program will use the scheme specified to fetch the results.
AMS: Data Mining Engine Program Property File	Yes	Site	Free form text corresponding to the location of the property file created in Step 1.	The Java Concurrent Program will use the property file indicated in the profile option value to invoke program settings by calling ODM 9i APIs.

6. Set up Concurrent Manager Programs:
    a. Switch responsibility to Oracle Marketing Administrator.
    b. Navigate to Applications > Functions > Setups > Concurrent Requests.
    c. Click Submit New Request.

Concurrent Manager	Required	Description
Workflow Background Engine AMS Models Build/ Score	Yes	Choose item “AMS Models Build/Score” for the Workflow daemon to monitor data mining workflow requests. For data mining operations, a frequency of 30 minutes should be sufficient. Parameters: Process Deferred: Yes Process Timeout: Yes Process Stuck: Yes
AMS Expire Data Mining Models	Yes	Background process that monitors data mining models for expiration. A frequency of once a day should be sufficient.
AMS Update Data Mining Models	Optional	Updates detail information collected on parties. The frequency should be the same as the BIC Summary Extraction process.

7. Verify and Create Lookups for Data Mining:
   a. Log into Forms and select Oracle Marketing Administrator responsibility.
   b. Navigate to Functions > Setups > Lookups.
   c. Use View > Find to locate the individual keys.

Note: System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for Lookups and their types, values and meanings.

Key	Type	Values	Meanings
AMS_DM_ MODEL_ STATUS	System	Available	Available
		Draft	Draft
		Building	Building
		Scheduled	Scheduled
		Scoring	Scoring
		Archived	Archived
		Expired	Expired
		Custom	Custom
		Preview	Preview
		Queued	Queued
AMS_DM_ MODEL_ TYPE	System	Email	Email Response
		Telemarketing	Telemarketing Response
		DirectMail	Direct Mail Response
		Loyalty	Loyalty/Retention

Key	Type	Values	Meanings
AMS_DM_ SCORE_ STATUS	System	Draft Scheduled Scoring Completed Archived Preview Queued	Draft Scheduled Scoring Completed Archived Preview Queued
AMS_DM_ TARGET_ GROUP_ TYPE	System	Business Consumer	Organization Contacts Persons
AMS_DM_ SOURCE_ TYPE	System	Standard Cell CSCH DIWB	Generated List Segment Campaign Schedule Discoverer Workbook
AMS_DM_ TARGET_ VALUE_ TYPE	System	Binary Categorical Continuous	Binary Categorical Continuous

8. Test Implementation of Data Mining:
   a. Log into Oracle Marketing Online.
   b. Navigate to the Analytics tab. The Model summary page should display.
   c. Click the Scoring Runs subtab. The Scoring Runs summary page should display.
   d. Click the Model subtab. Click Create. The Create Model page should display.
   e. Enter required information and click Create. You will receive a confirmation message and the Model details page displays.
   f. Select the Training Data item from the Side Navigation Menu and select data.
   g. Select the Build item from the Side Navigation Menu and submit a build request. Workflow should start for the model build process. Track the progress from the Model log entries on the Models summary page.

h. Select the Scoring Runs subtab. Click Create.

i. Enter required information, including selecting an available model from the Model LOV. Click Create to receive a confirmation.

j. Click the Selections item from the Side Navigation Menu and select some data for scoring.

k. Select the Score item from the Side Navigation Menu and submit a scoring request. Workflow should start for the scoring run process. Track the progress from the scoring run log entries in Scoring Runs summary page.

5.9 Implement Products

Implementing Products gives Marketing Online a link to Oracle Inventory in order to tie various marketing objects to specific products or product families. The Product tab also gives the marketer the opportunity to enter new products, and price lists, or create new bundling of existing products.

Use

Products may be used with Campaigns, Events, Offers, and Deliverables as a limiting factor for those objects.

Integration

Products are integrated with Oracle Advanced Pricing, Oracle Inventory, Oracle Bill of Materials, and *i*Store.

Prerequisites

Complete the implementation steps required for inventory. Please refer to the *Oracle Inventory Implementation Guide*.

If planning to use the Store item on the Side Navigation Menu, make sure that *i*Store is implemented. The Store item displays the sections created in Store and assigned items to them. There is also a walk-in user Price List attached to the Store. The Multimedia item on the Side Navigation Menu uses the images uploaded in *i*Store and attaches them to the appropriate items.

Steps

Stem	Required	Description
1. Set System Profiles	Yes	Enter System Profile Options.

Stem	Required	Description
2. Verify and Create Lookups for Products	Yes	Verify Lookups for Products.
3. Test Implementation of Products	Yes	Perform tests to verify the implementation of Products is correct.

1. Set System Profiles:

   a. Log into Forms as the Implementation User and select the System Administrator Responsibility.

   b. Navigate to Functions > Profile > System.

   c. Enter the profile name in the Profile Field and click Find.

   d. Enter the appropriate value in the column corresponding to the level indicated.

   e. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
AMS: Allow Inventory Item Update	Yes	User	Yes/No	Indicates whether user from OMO application is allowed to update inventory item. Note: This profile is updatable only by the system administrator though it is a user level profile.

2. Verify and Create Lookups for Products:

   a. Log into Forms and select Oracle Inventory Administrator responsibility.

   b. Navigate to Functions > Setups > Lookups.

   c. Use View > Find to locate the individual keys.

   Note: System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for Lookups and their types, values and meanings.

Key	Type	Values	Meanings
ITEM_TYPE	Extensible	AI	ATO Option Class
		AOC	ATO item
		ATO	ATO model
		CONSULTING	Contracts - consulting
		EDU	Contracts - Education
		FG	Contracts - KIT
		FRT	Contracts - Media
		I	Contracts - Software
		K	License
		KIT	Contracts - Training
		M	Finished good
		MEDIA	Freight
		NRI	Inventory Type
		OC	Kit
		OP	Model
		P	Non-recurring
		PF	Option Class
		PH	Outside Processing Item
		PL	PTO Option Class
		POC	PTO model
		PTO	Phantom item
		REF	Planning
		RI	Product Family
		SA	Purchased Item
		SI	Recurring
		SW LIC	Reference Item
		TRAIN	Subassembly supply item
INVENTORY_ ITEM_ STATUS_ CODE	User	ACTIVE	Active
		INACTIVE	Inactive

3. Test Implementation of Products:

   a. Log into the application and navigate to the home page. The user name should appear there.

   b. Navigate to Products and click Create. Check the following LOVs for availability: Owner, Product Type, Master Organization and Unit of Measure.

   c. Create an item from Oracle forms application. Log on using Inventory responsibility and create an item in Inventory. This will validate if inventory has been set up properly. If item creation fails at this stage, then Oracle Marketing Online cannot be used to create items.

4. Setup and Run Concurrent Manager Programs.

   Note: Compile the Inventory System Items Flexfield and the Inventory Category Flexfield if there has been a change in the flexfield structure, before running this concurrent manager program.

   ---

   a. Switch responsibility to Oracle Marketing Administrator.

   b. Navigate to Applications > Functions > Setups > Concurrent Requests.

   c. Click Submit a New Request.

See the table below for concurrent managers and descriptions.

Concurrent Manager	Required	Description
AMS Load Inventory Categories	Yes	Loads categories from the MTL schema to the AMS schema denormalized tables. This program should be run if and when a new category is created in Inventory.

Known Issues or Conflicts

Always compile the inventory system items flexfield and the inventory category flexfield after applying a patch.

5.10 Implement Price Lists

Price Lists are used to price Products. Products can be added to multiple price Lists which can be in different currencies support a global pricing strategy. Price Lists can have eligibility defined so that customers who match the criteria alone eligible for the price.

Use

Events and deliverables that are created as inventory items can be added to a Price List. Price Lists can be attached to offers as qualifiers so that customers can get a discount on a specific price.

Integration

Oracle Quoting-Forms and Oracle Order Management will utilize the price lists setup in Oracle Marketing Online when an order is booked by the customer.

Steps

Step	Required	Description
1. Set System Profiles	Yes	Enter various System Profile Options for Price Lists.
2. Verify and Create Lookups for Price Lists	Yes	Verify Lookups for Price Lists.
3. Test Implementation of Price Lists	Yes	Perform tests to verify the implementation of Price Lists is correct.

1. Set System Profiles:
   a. Log into Forms and select System Administrator responsibility.
   b. Log into Forms as the implementation user and select the System Administrator Responsibility.
   c. Navigate to Functions > Profile > System.
   d. Enter the profile name in the Profile Field and click Find.
   e. Enter the appropriate value in the column corresponding to the level indicated.
   f. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
QP: Item Validation Organization	Yes	Respon sibility	Select from Inventory Organizations set up in Inventory	Prices may be defined only for those products which will be available in the specified organization.
AMS: Allow Updates to QP Price Lists in OMO	Yes	Respon sibility	Yes/No	Selecting Yes will allow Price lists created using Advanced Pricing to be edited in Oracle Marketing Online.
AMS Root Section for Price List Report	Yes	Site	Sections defined in the hierarchy Tab of iStore's Merchant UI	Price list report available from the overview page will utilize the section set in this profile to determine the section hierarchy. Items can be grouped into sections. Sections in turn can be grouped into other sections, creating a hierarchical structure.

2. Verify and Create Lookups for Price Lists:
    a. Log into Forms and select Oracle Inventory Administrator responsibility.
    b. Navigate to Functions > Setups > Lookups.
    c. Use View > Find to locate the individual keys.

    Note: System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for Lookups and their types, values and meanings.

Key	Type	Values	Meanings
AMS_ PRICE LIST_ STATUS	System	Active Draft Rejected Pending Cancelled	Active Draft Rejected Pending Budget Approval Cancelled

3. Test Implementation of Price Lists.
   a. Navigate to Products > Price Lists.
   b. If Profile AMS: Allow Updates to QP Price Lists in OMO is set to Yes, then you should be able to update price lists created through the Advanced Pricing application.

5.11 Implement Deliverables

Deliverables are hard or soft, electronic, collateral that is transmitted to a customer, prospect or an event registrant, or attendee.

Use

Deliverables are utilized by both campaigns and events.

Integration

Deliverables are integrated into Oracle Inventory. When a deliverable is created as an inventory item, it is created as a collateral item. These collateral items are available to Oracle Telesales.

Deliverables created as inventory items may be priced using Oracle Pricing in Oracle Marketing Online.

Prerequisites

None

Steps

Step	Required	Description
1. Set System Profiles	Yes	Enter various System Profile Options for Deliverables.
2. Verify and Create Lookups for Deliverables	Optional	Verify Lookups for Deliverables.
3. Test Implementation of Deliverables	Yes	Perform tests to verify the implementation of Deliverables is correct.

1. Set System Profiles:
   a. Log into Forms and select System Administrator responsibility.
   b. Log into Forms as the implementation user and select the System Administrator Responsibility.
   c. Navigate to Functions > Profile > System.
   d. Enter the profile name in the Profile Field and click Find.
   e. Enter the appropriate value in the column corresponding to the level indicated.
   f. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
AMS: Item Validation Master Organization	Yes	Site	A valid Master Inventory Organization	When a deliverable is flagged as an inventory item, it is created in Inventory under the specified master organization.

2. Verify and Create Lookups for Deliverables:
   a. Log into Forms and select Oracle Marketing Administrator responsibility.
   b. Navigate to Functions > Setups > Lookups.
   c. Use View > Find to locate the individual keys.

Note: System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for Lookups and their types, values and meanings.

Key	Type	Values	Meanings
AMS_DELIV_STATUS	User	Archived Available Cancelled Denied_BA New Submitted_BA Superseded Expired Denied_TA Budget_Appr Submitted_TA	Archived Available Cancelled Denied - Budget Approval New Submitted - Budget Approval Superseded Expired Denied - Concept Approval Budget Approved Submitted - Concept Approval
AMS_EVENT_FULFILL_ ON	System	On_Cancel On_Enroll On_Reg	On Cancellation On Enrollment On Registration
AMS_CAMP_FULFILL_ON	System	On_Invite	On Invite
AMS_OBJECT_USAGE_ TYPE	System	Created Used_By	Created Used By

3. Test Implementation of Deliverables:

    a. Log in to Oracle Marketing Online and navigate to the home page. The user name should appear there.

    b. Click the Deliverables tab and select Create. Check if the owner and country fields are populated.

5.12 Implementing Marketing Intelligence

This Chapter describes how to implement Marketing Intelligence functionality that can be displayed on the home page of the Application.

Implementation Steps

Step	Required	Description
Set up Profile Options	Yes	Set up the two profile options: AMS Marketing Calendar AMS Default Currency Code
Define Marketing Calendar Periods	Yes	The calendar periods must be defined for the Marketing Calendar for the fiscal year containing the date one year prior to the start date.
Exchange Rates	Yes	Exchange rates between transaction currencies and the default currency in AMS Default Currency Code must be set up.
Run Concurrent Manager Program BIM: Truncate all Facts	Yes	This program is run only as needed to remove all facts loaded in previous refresh.
Run Concurrent Manager Program Request Set BIM: Load Marketing Facts for the First Time	Yes	The program must be run once for each of the following marketing objects: campaigns, events, and budgets.
Run Concurrent Manager Program Request Set BIM: Initial Build	Yes	This request set is run for four marketing objects: campaigns, events, budgets and key performance indicators.
Run Concurrent Manager Program Request Set BIM: Refresh Materialized Views	Yes	This request set is run for five marketing objects: campaigns, events, budgets, key performance indicators, and marketing activities.

Refresh Steps

Step	Required	Description
Run Concurrent Manager Program Request Set BIM: Load Marketing Facts from Previous Refresh Date	Yes	This request set is run daily on four marketing objects: campaigns, events, budgets and key performance indicators.

Step	Required	Description
Run Concurrent Manager Program Request Set BIM: Refresh Materialized Views	Yes	This request set is run for five marketing objects: campaigns, events, budgets, key performance indicators, and marketing activities.

Note: Estimated times are based on a sample data set. The actual time required will depend on the amount of data, number of processors used, among other factors.

5.12.1 Setting System Profile Options

Steps

1. Log into Forms under System Administrator responsibility.
2. Navigate to Profile > System.
3. Enter the profile name in the Profile Field and click Find.
4. Enter the appropriate value in the column corresponding to the level indicated.
5. Save your work.

See the table below for System Profile Options and their values.

Option	Required	Level	Setting
AMS Marketing Calendar	Yes	System	Select the Marketing Calendar Set up in Financials > Calendars > Accounting
AMS Default Currency	Yes	System	Select defined currency

5.12.2 Define Marketing Calendar Periods

Identify the Calendar associated with the profile AMS Marketing Calendar and define Periods on this calendar for the Fiscal Year, which contains the date one year prior to the start date of the first time facts load, to the current Fiscal Year. It is required that periods of type Month, Quarter, and Year should be defined.

For example, the Fiscal Year starts from 1st June of every year. To load the facts from 01-SEP-00, it is required to define the periods for the Marketing Calendar starting with the Fiscal Year containing the date 01-SEP-99 to the current Fiscal Year.

Steps

1. Log into Forms with System Administrator responsibility.
2. Navigate to Profile > System.
3. Use Find to locate the profile AMS: Marketing Calendar.
4. Note the calendar entered in this profile.
5. Switch responsibility to General Ledger Super User.
6. Navigate to Setup > Financials > Calendars > Accounting.
7. Locate the Calendar noted above and verify the required periods are entered.

5.12.3 Exchange Rates

Exchange rates need to be defined between the transaction currency and the default currency code associated to the profile AMS Default Currency. The rates must be defined between the currencies, from the date the transactions will be loaded.

For example, if loading all the Campaigns which started on or after 01/SEP/00 where the minimum approval date is 01/Mar/00, the currency exchange rates need to be defined from 01/Mar/00.

Currency Conversions

All the transactions amounts will be converted to the default currency code associated to the profile AMS Default Currency. All currencies used in transactions must have a conversion rate defined with the conversion rate type specified in the profile AMS Currency Conversion Type.

Steps to Add a Conversion Rate

1. Log into Forms for General Ledger Super User responsibility.
2. Navigate to Setup > Currencies > Rates > Daily.
3. Click Enter by Date Range to enter a range of dates the rate is applicable.
4. Select the From and To currencies.
5. Enter a From date and a To date.

6. Set the type equal to the type specified in the profile AMS Currency Conversion Type.
7. Save your work.

5.12.4 Run Concurrent Program: BIM: Truncate all facts

This concurrent program removes previously loaded facts. It should be used only when the current data should be removed in its entirety.

Parameters

- Objects (select from: All, Campaigns, Events, Budgets)
- Confirm: Y

Effects and Limitations

- Truncates all facts loaded in previous refresh.
- Run only when needed.

5.12.5 Request Set: BIM: Load Marketing facts for the first time

Execute this Request Set only for the first time load. This Request set consists of following concurrent programs.

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Load Marketing Facts for the First Time	Object to Load: Campaign Start Date: 01-SEP-00 End Dates: (SYSDATE)	2 Hrs., 15 Mins	Loads all Campaign Facts
2	BIM: Load Marketing Facts for the First Time	‘Object to Load: Event Start Date: 01-SEP-00 End Dates: (SYSDATE)	6 Mins	Loads all Event Facts
3	BIM:Load Marketing Facts for the First Time	Object to Load: Budget Start Date: 01-SEP-00 End Dates: (SYSDATE)	20 Mins	Loads all Budgets Facts

Seq	Concurrent Program	Parameters	Est Time	Comments
4	BIM:Load Key Performance Indicator Facts		1 Min	Loads KPI facts

Steps

1. Switch responsibility to Marketing Intelligence Collection Manager.
2. Navigate to Requests > Run.
3. Select the Request Set Radio button and click OK.
4. Choose BIM: Load Marketing facts for the first time from the LOV. The Program block will list the above concurrent programs. When programs are first listed, the Parameters column is blank for all programs.
5. Click on the Parameter column of the first row.
6. The system displays a Parameter window, where all the parameters are defaulted automatically.
7. Note that the Start and End dates are defaulted to the sysdate. Change the dates as desired and click OK. The Start Date should be the first date for which data should be shown.
8. Click on the Parameter column of the second row.
9. The system displays a Parameter window with all the parameters defaulted automatically to the values entered in the first row.
10. Click on the Parameter column of the third row.
11. The system displays a Parameter window with all the parameters defaulted automatically to the values entered in the previous row.
12. After verifying all the parameters, click Submit. The Request set will run and execute all the above concurrent programs sequentially.

Note: This program should be run only once. If for any reason, a user intends to re-run this request set again, execute the Concurrent Program, BIM: Truncate all facts, before running the Concurrent Manager Program, BIM: Load Marketing facts for the first time.

5.12.6 Request Set: BIM: Initial build of Materialized Views

Execute this Request Set only for the first time. This prepares the pre-built tables for all materialized views.

This Request Set consists of the following concurrent programs:

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Initial build of Campaigns Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Campaigns Materialized views
2	BIM: Initial build of Events Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Events Materialized Views
3	BIM: Initial build of Budgets Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Budgets Materialized views
4	BIM: Initial build of Key Performance Indicators Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Key Performance Indicators Materialized views

Steps

1. Switch responsibility to Marketing Intelligence Collection Manager
2. Navigate to Requests > Run.
3. Select the Request Set Radio button and click OK.
4. Choose BIM: Initial build of Materialized Views from the LOV. The Program block will list the above concurrent programs. Note that the Parameters column is blank for all the programs.
5. Click on the Parameter column of the first row.
6. The system displays a Parameter window, where the parameter, Number of Parallel Processors, is defaulted automatically to 8. Change the value for this parameter to 4 and click OK. Four processors is sufficient to run this Request Set.
7. Click on the Parameter column of the second row.
8. The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4.
9. Repeat the steps 5 and 6 for the third and fourth rows.

10. After verifying all the parameters, click Submit. The Request set will run and execute all the above concurrent programs sequentially.

> **Note:** This program has to be run only once and should not be run during subsequent loads.

5.12.7 Request Set: BIM: Refresh Materialized Views

Builds the Materialized views for Campaigns, Events, Budgets, Key Performance Indicators and Marketing Activities. This Request Set should be run only after the facts are loaded, either by the Request Set: BIM: Load Marketing facts for the first time or by Request Set: BIM: Load Marketing facts from the previous refresh date.

This Request set consists of following concurrent programs.

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Refresh Campaign Materialized views	Number of Parallel Processors: 4	20 Mins	Builds Campaign Materialized views
2	BIM: Refresh Events Materialized views	Number of Parallel Processors: 4	10 Mins	Builds Events Materialized views
3	BIM: Refresh Budgets Materialized views	Number of Parallel Processors: 4	20 Mins	Builds Budgets Materialized views
4	BIM: Refresh Key Performance Indicator Materialized views	Number of Parallel Processors: 4	5 Mins	Builds KPI Materialized views
5	BIM: Refresh Marketing Activities Materialized views	Number of Parallel Processors: 4	5 Mins	Builds Marketing Activities Materialized views

Steps

1. Switch responsibility to Marketing Intelligence Collection Manager.
2. Navigate to Requests > Run.
3. Select the Request Set Radio button and click OK.
4. Select BIM: Refresh Materialized Views from the LOV. The Program block will list the above concurrent programs. Note that the Parameters column is blank for all the programs.
5. Click on the Parameter column of the first row.

6. The system displays a Parameter window, where the parameter Number of Parallel Processors is defaulted automatically to 8.
7. Change the value for this parameter to 4 and click OK. Four processors is sufficient to run this Request Set.
8. Click on the Parameter column of the second row.
9. The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4.
10. Repeat steps 8 and 9 for third, fourth, and fifth rows.
11. After verifying all the parameters, click Submit. The Request set will run and execute all the above concurrent programs sequentially.

Note: This program has to be run each time after facts are loaded or refreshed.

5.12.8 Request Set: BIM: Load Marketing facts from previous refresh date

This request set will load all the marketing facts from the refresh date.

Execute this Request Set on a daily basis.

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Load Marketing Facts from previous refresh date	Object to Load: Campaign End Date: (SYSDATE) Number of Parallel Processors: 4	5 Mins	Loads all Campaign Facts from the previous refresh date
2	BIM: Load Marketing Facts from previous refresh date	Object to Load: Event End Date: (SYSDATE) Number of Parallel Processors: 4	5 Mins	Loads all Events Facts from the previous refresh date
3	BIM: Load Marketing Facts from previous refresh date	Object to Load: Budget End Date: (SYSDATE) Number of Parallel Processors: 4	5 Mins	Loads all Budget Facts from the previous refresh date

Seq	Concurrent Program	Parameters	Est Time	Comments
4	BIM: Load Key Performance Indicator facts from previous refresh date		5 Mins	Loads all KPI Facts from the previous refresh date

Steps

1. Switch responsibility to Marketing Intelligence Collection Manager.
2. Navigate to Requests > Run.
3. Select the Request Set Radio button and click OK.
4. Select BIM: Load Marketing facts from previous refresh date from the LOV. The Program block will list the above concurrent programs. When the programs are listed, the Parameters column is blank for all the programs.
5. Click on the Parameter column of the first row.
6. The system displays a Parameter window, where all the parameters are defaulted automatically.
7. Note that the End date is defaulted to the sysdate. Change the date as desired and click OK.
8. Click on the Parameter column of the second row.
9. The system displays a Parameter window with all the parameters defaulted automatically. Note that the end date is defaulted to the value entered in the first row. Change the date as desired and click OK.
10. Click on the Parameter column of the third row.
11. The system displays a Parameter window with all the parameters defaulted automatically.
12. Note that the end date is defaulted from to the value entered in the first row. Change the date as desired and click OK.
13. After verifying all the parameters, click Submit. The Request Set will run and execute all the above concurrent programs sequentially.
14. Note: that this program has to be run on a daily basis.
15. Run the Request Set: BIM: Refresh Materialized Views, above, to build the materialized views following the steps instructions listed above.

Note: This program should be run on a daily basis.

5.12.9 Troubleshooting tips for Request Sets

Error and debug messages are provided wherever possible. However, in certain situations where Rollup and Cube functions are used, error messages could not be tracked due to the limitations with PL/SQL. In situations where the log files of the concurrent program do not report a proper message, follow the techniques given below:

- First, verify that all Marketing calendar periods are defined. If not, define the periods of type Month, Quarter, and Year for each fiscal year.
- Verify if enough table space exists for BIM tables table space, indexes table space, and temp table space. This table space size can be determined by the local DBAs.
- In case of failures in Request Set: BIM: Refresh Materialized Views, locate the spool file generated by each SQL file. The spool file is named after the executable listed in the concurrent log file. This file will be located in a directory specific to instance (which is managed by the local DBA).

  For example, when Marketing activities are refreshed a log (spool) file is generated with the name of this concurrent program executable i.e., bimactld.log (executable name is bimactld.sql).

See Configuring Bins, Reports and Charts in Appendix Q.

5.13 Implement Web Posting

Web Posting allows a particular content selection strategy to be executed depending on the conditions present. For example, if a registered user logs into a site, a particular posting is displayed, however, if a new user logs into the same site, a different posting may be displayed. Web Postings may be of two types: universal and rule based. With the universal type, everyone receives the same posting. With rule based Web Postings, conditions are analyzed and postings are displayed according to the conditions.

Use

Segments and Campaigns may be used during rule definition. Postings are integrated with Schedules and Products.

Integration

Web Postings are integrated with Oracle *i*Store and Oracle Partners Online.

Prerequisites

Implement *i*Store prior to completing these steps if integrating with *i*Store. For additional information, please see the *iStore Implementation Guide*.

Implement Partners Online prior to completing these steps if integrating with Partners Online. For additional information, please see the *Partners Online Implementation Guide*.

Steps

Step	Required	Description
1. Set System Profiles	Yes	Enter various System Profile Options for Events.
2. Verify and Create Lookups for Web Postings	Optional	Verify Lookups for Web Postings.
3. Set up and Run Concurrent Manager Programs	Yes	Web Execution: Refresh Minisite Items Web Execution: Refresh Campaign Items
4. Administration Setup	Yes	Set up parameters in the Administration tab. See Administering Marketing Online for more information.
5. Test Implementation of Web Posting	Yes	Perform tests to verify the implementation of Web Posting is correct.

1. Set System Profiles:
   a. Log into Forms and select System Administrator responsibility.
   b. Log into Forms as the implementation user and select the System Administrator Responsibility.
   c. Navigate to Functions > Profile > System.
   d. Enter the profile name in the Profile Field and click Find.
   e. Enter the appropriate value in the column corresponding to the level indicated.
   f. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
AMS Item Validation Organization	Yes	Site	User Defined	Determines whether the Organization ID is used for items.
AMS: Custom Condition Class	Optional	Site	Java class name of the custom condition	This class is invoked at runtime when custom conditions are implemented.
AMS: Default Product Stylesheet	Yes	Site	User defined	Determines the default stylesheet file for Products.
AMS: Default Schedule Stylesheet	Yes	Site	User Defined	Determines the default stylesheet file for Schedules.
AMS: OA Media	Optional	Site	Physical file path of media directory where the image files are stored.	This is used in the upgrade process to read the files from the media directory and store them in the database.
AMS: Posting Runtime Shopping Cart Currency	Yes	Site	Select from a list of values. USD is the default.	Determines the currency in which shopping cart amounts are measured.
AMS: Upgrade iMarketing	Optional	Site	Yes/No	Used to determine whether to upgrade iMarketing data from the previous version.

2. Verify and Create Lookups for Web Postings:
    a. Log into Forms and select Oracle Marketing Administrator responsibility.
    b. Navigate to Functions > Setups > Lookups.
    c. Use View > Find to locate the individual keys.

Note: System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for Lookups and their types, values and meanings.

Key	Type	Values	Meanings
AMS_POST_ CONTENT_ TYPES	System	Product Schedule	Product Web Advertisement
AMS_POST_ STRATEGY_ TYPE	System	Manual_ Selection Product_ Relationship Inferred_OP Custom	Manually selected strategy Strategy based on product relationship Inferred based on Oracle Personalization Custom strategy
AMS_POST_ PREDEF_ PROD_ CONTEXT	System	Prod_viewed Prod_in_cart	The product context for relationship based strategy.
AMS_PRIOR_ SORT_ ORDER	System	Asc Desc	Ascending Descending
AMS_POST_ CATEGORY	System	Universal Rulebased	Posting types: Universal or based on a rule.
AMS_POST_ STATUS	System	Active Inactive	
AMS_POST_ BUSPRIOR (Business Priority)	System	None Random Prod_list_ price Campaign_ Start_ Date Campaign_ End_ Date Campaign_ Priority	None Random (for all) List Price (for products only) Start Date, End Date, or Priority (for campaign schedules).

Key	Type	Values	Meanings
IBE_ RELATIONSHIP_ TYPES	Extensible	Possible relationships between Products like Cross Sell, Up Sell.	This is an *i*Store lookup type.
AMS_POST_ RELATIONSHIPS	System	Promoting Relationship types not covered by *i*Store	Promoting is a relationship not covered by *i*Store, as in promoting a product.
AMS_POST_ COMP_ OPERATOR	System	EQ GTE LTE	Equal to Greater than or equal to Less than or equal to Used to compare shopping cart amount.
AMS_POST_ AUDIENCE_ TYPE	System	S L	Segment List
AMS_POST_ CND_DATA_ TYPE	System	Float String	Data Types returnable by Custom Condition Class.

3. Setup and Run Concurrent Manager Programs:
   a. Switch responsibility to Oracle Marketing Administrator.
   b. Navigate to Applications > Functions > Setups > Concurrent Requests.
   c. Click Submit a New Request.

See the table below for concurrent managers and descriptions.

Concurrent Manager	Required	Description
Web Execution: Refresh Minisite Items	Yes	This refreshes the denormalized table for minisites periodically to capture items in the *i*Store minisites.
Web Execution: Refresh Campaign Items	Yes	Information about Campaigns is stored in multiple tables. To improve runtime performance, this program periodically collects required information on campaigns and places it into a single table.

Note: Both of these Concurrent Manager programs may need to be run when additional minisites or campaigns are created. These also need to be run when new items are created or when new items are assigned to minisites or campaigns.

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4. Administration Setup:
   a. Log into Marketing Online.
   b. Navigate to Administration > Marketing.
   c. Make the following selections, entering information as it pertains to Web Postings.

See the table below for Administration selections and their values.

Component	Item	Choices	Effect
Execution	Strategies	User Created and Seeded	Any additional custom strategies that are needed are created here. A java class is required which contains the logic and code.
Execution	Rules	User Created	Extend up to five conditions that can be used in rule definitions for a rule-based posting.

5. Test Implementation of Web Posting:
   a. Log into Oracle Marketing Online.
   b. Navigate to the Execution tab. The Web Posting and Web Placement subtabs should be displayed.
   c. Click the Web Posting subtab. The Posting Overview page should be displayed.
   d. Click the Web Placement subtab. The Placement Overview page should be displayed.

Note: **If implementing *i*Store:** After creating a posting and a placement, the jsp, amsWebPlacement.jsp, should be attached to the desired bins in *i*Store in order to display the posting in that bin.

5.14 Implement Web Placement

Placement is a component that associates a Posting and a style with a physical location on a real page. Placement can be defined for a site, page, and a location.

Use

Web Placements are integrated with Web Postings. Web Postings are in turn used as an execution media for campaigns.

Integration

Web Placements are integrated with Oracle *i*Store and Oracle Partners Online.

Prerequisites

Implement *i*Store prior to completing these steps if integrating with *i*Store. For additional information, please see the *iStore Implementation Guide*.

Implement Partners Online prior to completing these steps if integrating with Partners Online. For additional information, please see the *Partners Online Implementation Guide*.

Steps

Step	Required	Description
1. Set System Profiles	Yes	Enter various System Profile Options for Web Placement.
2. Verify and Create Lookups for Web Placement	Optional	Verify Lookups for Web Placement.
3. Administration Setup	Yes	Set up parameters in the Administration tab.
4. Set up Guest User	Yes	Set up the Guest User.
5. Test Implementation of Web Placement	Yes	Perform tests to verify the implementation of Web Placement is correct.

1. Set System Profiles:
   a. Log into Forms and select System Administrator responsibility.
   b. Navigate to Functions > Profile > System.
   c. Enter the profile name in the Profile Field and click Find.

d. Enter the appropriate value in the column corresponding to the level indicated.

e. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
AMS: Merchant Party ID	Optional	Site	Choose from a list of Parties provided	This value determines the party ID of the current active merchant. This sets the merchant ID for the creation of affiliate placements.
AMS: Server URL	Optional	Site	User Defined	This value determines the runtime URL path of the server. Used to generate API details for affiliates during placement definition.
AMS: Oracle Personalization Enabled	Optional	Site	Yes/No	This enables the use of Oracle Personalization. Before enabling this option, Oracle Personalization must already be implemented.
IBE: Use Web Placements	Yes	Appli cation	Yes/No	Determines whether placements are displayed. Required only when implementing *i*Store.
PV: Enable Web Marketing	Optional	Site (see effect col.)	Yes/No	Determines when Placements are displayed in Partners Online. Required only when implementing Partners Online. Setting levels: Application (Partners Online) and Responsibility (Vendor Admin)

2. Verify and Create Lookups for Web Placement:

a. Log into Forms and select Oracle Marketing Administrator responsibility.

b. Navigate to Functions > Setups > Lookups.

c. Use View > Find to locate the individual keys.

> **Note:** System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for LOVs and their types, values and meanings.

Key	Type	Values	Meanings
AMS_PLCE_ SITE_ CATEGORY	System	Oracle_Applications Other_Applications Affiliates	Oracle Applications Other Applications Affiliates
AMS_PLCE_ LOCATION_ CODE	Extensible	Left1, Left2…Left7 Right1, Right2 … Right7 Top Bottom	Positions for placements

3. Administration Setup:
   a. Log into Marketing Online.
   b. Navigate to Administration > Marketing.
   c. Make the following selections, entering information as it pertains to Web Placement.

See the table below for Administration selections and their values.

Component	Item	Choices	Effect
Execution	Sites	User Created and Seeded	Create a new site here.
Execution	Pages	User Created and Seeded	Create new pages for a site.
Execution	Styles	User Created and Seeded	Create new styles for content type(s).

4. Setup up Guest User.

The guest user is required and is set up as follows:

a. Log into Forms with System Administrator responsibility.
b. Navigate to Settings > System > Advanced.
c. From the list of applications, select JTF.
d. Navigate using Next/Prev links until a page displays:
   - Guest Partyname
   - Guest password
   - Guest Username
e. Set values as follows, if these values are already set you need not change them.
   - Guest Partyname = IBEGUEST
   - Guest Password = *Password* (user defined)
   - Guest Username = ibeguest.
f. Save your work
g. Log out of Forms.

5. Test Implementation of Web Placement:
   a. Log into Oracle Marketing Online.
   b. Navigate to the Execution tab. The Web Placement subtab should be displayed.
   c. Click the Web Placement subtab. The Placement Overview page should be displayed.

Stylesheets

The following stylesheets are seeded:

Name	Description	File Name
Schedule banner	Displays content having full banner, half banner, and short description attributes	amscpns1.xsl
Schedule micro image	Displays content having micro bar images, short description and description attributes.	amscpnm3.xsl
Universal schedule	Displays any type of content independent of any specific content attribute.	amspstng.xsl

Name	Description	File Name
Product short description	Displays a link to the product detail page along with a short description.	amsprod1.xsl
Product thumbnail image	Displays a link to the product detail page along with a thumbnail image.	amsprod2.xsl
Product thumbnail image with shopping cart link	Displays a link to the product details page, a link to the shopping cart page along with a thumbnail image.	amsprod3.xsl
Product small image with shopping cart link	Displays a link to the product detail page, a link to the shopping cart page along with a small image.	amsprod4.xsl

Known Issues or Conflicts

After attaching amsWebPlacement.jsp to bins in *i*Store, the Apache server must be bounced. The best practice is to perform all the required bin associations and then bounce the server.

Note: **If implementing *i*Store:** After creating a posting and a placement, the jsp, amsWebPlacement.jsp, should be attached to the desired bins in *i*Store in order to display the posting in that bin.

5.15 Implement Claims

The claims tab is a major portion of the Trade Management functionality of Marketing Online. The claims tab allows for tracking, processing and resolution of claims made by retailers and distributors against product invoices. Customers may short pay an invoice for a variety of reasons, frequently without notice or supporting documentation. This short payment generates a deduction which must be tracked, investigated, and resolved.

Use

Claims are integrated with budgets, campaigns and offers for the purposes of tracking sources of short payments.

Integration

Claims are integrated with Oracle Payables, Oracle Receivables, and Oracle General Ledger.

Prerequisites

Oracle Payables, Oracle Receivables and Oracle General Ledger must be implemented.

1. Oracle Receivables:

   a. Log on with Oracle Receivables responsibility.

   b. Navigate to Setups > System > System Options.

   c. Verify the Name field has the name of a Set of Books populated in it and that the field is not updateable.

   This verifies that Oracle Receivables and General Ledger are implemented.

2. Oracle Payables:

   a. Log on with Oracle Payables responsibility.

   b. Navigate to Setups > Options > Payables.

   c. Verify the Set of Books field has the name of a Set of Books populated in it and that the field is not updateable.

   This verifies that Oracle Payables is implemented.

Steps

Step	Required	Description
1. Assign Receivable Role to Attribute Receivables Role in AMS: Claims Settlement Workflow	Yes	This sets up workflow notification to Accounts Receivable for settlement of claims.
2. Verify the Line Transaction Flexfield	Yes	Used by Autoinvoice to import credit and debit memos.
3. Create a Batch Source in Oracle Receivables	Yes	Used by Autoinvoice to import credit memos and debit memo generated by Claims.
4. Create an Aging Bucket in Oracle Receivables	Yes	Aging Buckets are the time periods used to review and report on open claims.
5. Create a Source in Oracle Payables	Yes	Used by Payables Open Interface Import to create invoices.
6. Set up Accounts in General Ledger	Yes	Set up accounts that are used for claims management.

Step	Required	Description
7. Attach the Trade Management Request Group	Yes	Required for running of trade management concurrent programs.
8. Set System Profiles	Yes	Enter various System Profile Options for Events.
9. Verify and Create Lookups for Claims	Yes	Verify and create Lookups for claims.
10. Set up Concurrent Manager Programs	Yes	Set up Concurrent Manager Programs for Claims.
10. Administration Setup	Yes	Set up parameters in the Administration tab.
11. Test Implementation of Claims	Yes	Perform tests to verify the implementation of Claims is correct.

1. Assign Receivable Role to Attribute Receivables Role in AMS: Claims Settlement Workflow.

   After the claim settlement is approved as specified in the Approval Rules, the AMS: Claim Settlement Process will route the notification to an Oracle Receivables User to close the deduction as indicated in the notification. The Oracle Receivables User is identified by the Receivables Role. You can specify the Receivables Role by using Oracle Workflow Builder. See Roles in the *Oracle Workflow Guide*.

   a. Open Workflow Builder.
   b. Open AMS: Claims Settlement from the database.
   c. Select File > Load Roles from database.
   d. Enter 'Receivable Role' in Find Roles and make a query.
   e. Select the Receivable Role from the query results and add it to the loaded roles.
   f. Click OK.
   g. Expand Item Type and Attribute for AMS: Claims Settlement.
   h. Double click on attribute 'Receivables Role'.
   i. Assign the Receivable Role to this attribute from the Value drop down menu under the default section.
   j. Save your work.

2. Verify the Line Transaction Flexfield Context.

   Verify the Line Transaction Flexfield context is set for Claims. This context will be used by Autoinvoice to import credit and debit memos:

   a. Switch responsibility to System Administrator.

   b. Navigate to Application > Flexfields > Descriptive > Segments Screen.

   c. Query on field "Title" with value Line Transaction Flexfield an available context of CLAIM.

3. Create a Batch Source in Oracle Receivables.

   A Transaction Batch Source is required to create debit memos and credit memos in Oracle Receivables. The settlement of a claim in the Claims module of Oracle Marketing Online may result in the creation of a debit or credit memo. AutoInvoice in Oracle Receivables will use the Transaction Batch Source to import the debit and credit memos from Claims. Use the guidelines below to set up the Transaction Batch Source. See Transaction Batch Source in the *Oracle Receivables User Guide*.

   a. Type. It is required that you select "Imported" for Transaction Batch source.

   b. Choose ID for each option under the Customer Information, Other Information, and Sales Credit Data Validation Tabs to indicate that the AutoInvoice validates the data for this batch source using an identifier.

4. Create Aging Bucket definition in Oracle Receivables.

   Aging buckets are time periods you use to review and report on open claims. Open claims include claims that in the statuses of Open, Complete, Pending Approval and Approved. Claims uses Oracle Receivables Aging Buckets for defining the buckets (See Aging Buckets under Chapter 2 of Oracle Receivables User Guide.) Please follow the guidelines specified below for defining the aging buckets:

   Buckets may have multiple bucket lines (time periods). Use the following bucket line types, available in Oracle Receivables (Oracle Receivables has more Types than those described below):

   - Current
   - Past Due
   - Future

Current: The usage of this type will age the claims outstanding or not yet resolved, based on the Claim date. For example, from 0 to 10 days old will display claims which are 0 to 10 days past the claim date.

Past Due: The usage of this type will age the claims that are past due in the range specified in the line. Note that the Aging Analysis is based on the Due date specified on the claim. For example, from 10 to 20 days past due will display claims which are 10 to 20 days past the past due date.

Future: The usage of this type will age the claims that will be due in the future. Please note that the Aging Analysis is based on the Due date specified on the claim. For example, from -10 days to -5 days will display claims which will become past due 5 to 10 days from the current date.

5. Create a Source in Oracle Payables.

   A Source is required for creating an invoice in Oracle Payables. When a claim is settled by issuing a check, this requires an invoice to be created in Oracle Payables. The Claims module will populate the payables invoice interface tables with the invoice details. See the *Oracle Payables User Guide* under the Lookups chapter.

6. Set up accounts in General Ledger.

   See *Oracle General Ledger Users Guide* for more information:

   a. Sales Expense account

   b. Accrual Liability account

   c. Receivables Clearing account

   d. Vendor Clearing account

7. Attach the Trade Management Request Group.

   Attach the Trade Management Request group to the responsibility used to perform Trade Management activities.

8. Set System Profiles:

   a. Log into Forms and select System Administrator responsibility.

   b. Log into Forms as the implementation user and select the System Administrator Responsibility.

   c. Navigate to Functions > Profile > System.

   d. Enter the profile name in the Profile Field and click Find.

e. Enter the appropriate value in the column corresponding to the level indicated.

f. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
AMS: Implement Payables	Yes	Site	Yes/No	If set to Yes, “Check” is a settlement option available when settling claims.
AMS: Implement Contra Charge	Yes	Site	Yes/No	If set to Yes, “Contra Charge” is a settlement option available when settling claims. Contra charges are used to track offsetting balances for creditors who are also debtors.

9. Verify and Create Lookups for Claims:

a. Log into Forms and select Oracle Marketing Administrator responsibility.

b. Navigate to Functions > Setups > Lookups.

c. Use View > Find to locate the individual keys.

Note: System Type keys may not be changed, deleted or added to. Extensible Type keys may have their visible values changed. User Type keys may have additional keys added as well as their seeded values changed.

See the table below for Lookups and their types, values and meanings.

Key	Type	Values	Meanings
AMS_CLAIM_ CLASS	System	Claim Deduction	Claim Deduction
AMS_CLAIM_ HISTORY_ EVENT	System	Changes Line New Split	Changes Line New Split

Key	Type	Values	Meanings
AMS_CLAIM_ PAYMENT_ METHOD	System	Check Credit_Memo Debit_Memo	Check Credit Memo Debit Memo
AMS_CLAIM_STATUS	System	Approved Cancelled Closed Complete Duplicate New Open Pending Pending_Approval Pending_Close Rejected	Approved Cancelled Closed Complete Duplicate New Open Pending Pending Approval Pending Close Rejected
AMS_ DEDUCTION_ PAYMENT_ METHOD	System	Adjustment Chargeback Contra_Charge Credit_Memo Debit_Memo Reg_Credit_Memo Write_Off	Adjustment Chargeback Contra Charge On Account Credit Debit Memo Invoice Credit Write Off
AMS_ CREATION_ SIGN	System	+ -	Positive Negative
AMS_GL_ DATE_TYPE	System	Claim_Date Due_Date System_Date	Claim Date Due Date System Date
AMS_GL_ EVENT_ LINE_ TYPE	System	Accrual_Liability Expense_Account Rec_Clearing Ven_Clearing	Accrual Liability Expense Account Receivable Clearing Acct. Vendor Clearing Account

Key	Type	Values	Meanings
AMS_GL_ EVENT_ STATUS	System	Accounted Accounted_With_ Error Created	Accounted Accounted with Error Created a New Transaction
AMS_GL_ EVENT_TYPE	System	Accrual Accrual_Adjustment Contra_Charge Settle_By_Credit Settle_By_WO Settle_By_Check	Accrual Liability Accrual Adjustment Settle by Contra Charge Settle by Credit Memo Settle to Writing Off Settle by Payment Voucher
AMS_ HISTORY_ RULES_ OBJECT	System	Claim	Claim
AMS_ OBJECT_ CLASS	System	Invoice Order Order_line PCHO	Invoice Order Order Line Purchase Order
AMS_ PAYMENT_ STATUS	System	Incomplete Interfaced Paid Pending	Incomplete Interfaced Paid Pending
AMS_ REASON_ CODE_ TYPE	User	Adjust_Reason Invoicing_Reason	Adjustment Reason Invoicing Reason

10. Set up Concurrent Manager Programs:
    a. Switch responsibility to Oracle Marketing Administrator.
    b. Navigate to Applications > Functions > Setups > Concurrent Requests.
    c. Click Submit a New Request.

See the table below for concurrent managers and descriptions.

Concurrent Manager	Required	Description
AMS-TM: Claims Autopay	Yes	Autopay program is used to pay accruals on a regular basis to customers. Autopay can be set up to pay accruals based on a customer, budget, campaign or offer. Parameters: ■ Customer ■ Budget ■ Offer ■ Campaign
AMS-TM: Claims Aging Population	Yes	Claims aging program populates the summary table for the claims aged by customer for an aging bucket. Aging will be run based on the system date. This program has to be run on a daily basis to get the daily aging analysis for the customers. Claims may be aged using a future type. This type will display claims that will become due, based on the Due Date, the specified number of days in the future. Parameter: Aging bucket defined in Oracle Receivables
AMS-TM: Claims Settlement Fetcher	Yes	Settlement fetcher gets the settlement data created in receivables and payables after settling a claim. Claim settlement on a manual claims gets created through autoinvoice or payables invoice import. These are programs which run on a batch mode and after the actual payment gets created in receivables or payables, settlement fetcher has to be run to get the settlement data to be shown in claims. Parameters: None

Concurrent Manager	Required	Description
AMS-TM: Transfer to General Ledger	Yes	Transfer to General Ledger is run to transfer the sub-ledger accounting entries created by claims/accruals into General Ledger accounting tables. Parameters: ■ Selection Type (1-Batch Transfer) ■ Set Of Books - Primary set of books ■ Transfer Reporting Books - Yes/No ■ Batch Name - Name of batch for transfer
AMS-TM: Import Claims	Yes	Import Claims imports the data from interface tables into claims. This program runs through the standard validations for claims creation and rejects the claims that are not successful for import. Parameters: None
AutoInvoice - Oracle Receivables	Yes	AutoInvoice is an Oracle Receivables concurrent program used to create credit memos/debit memos in receivables. It is used for creating credit memos on settling manual claims. Claims settled with receivables payment method gets created with the batch source defined in system parameters. For more information on parameters and options see the *Oracle Receivables Implementation Guide*.
Payables Open Interface Import - Oracle Payables	Yes	Payables open interface import is an Oracle Payables concurrent program used to create invoices in payables. It has to be run for the batch source defined in system parameters since all the claims settlement for payables get created with that batch source. For more information on parameters and options see the *Oracle Payables Implementation Guide*.

Note: These concurrent manager programs should be setup to run after use of Claims has commenced. They should not be run at the time of implementation.

---

11. Administration Setup:

    a. Log into Marketing Online.

    b. Navigate to Administration > Marketing.

    c. Make the following selections, entering information as it pertains to Claims.

See the table below for Administration selections and their values.

Component	Item	Choices	Effect
Claim	Claim Type		Claims types are required when creating claims and claim the LOV is based on the values from this page.
Claim	History Rule	Select columns to be created in history.	When any of the columns selected for history creation changes, a snapshot of the claim gets created as a history record.
Claim	Reasons		Reasons are required when creating claims and reason LOV is based on values from this page.
Claim	System Parameter		Enter information relative to claim management and payment. See section 6.18 for a complete description of the System Parameter page.
Claim	Trade Profile	Select or deselect checkbox User defined	Determines whether Autopay will be in effect for the selected Vendor. Indicates how often Autopay will test to see if a payment is required.
Claim	System Profile	List of vendors created in AP	Select a vendor to setup. Autopay will be run for the particular party/account based on the flag and will be run for the frequency mentioned with amount condition overriding the duration. For check payments vendor set in this profile will be used.

12. Test Implementation of Claims:

    a. Log into Marketing Online.

    b. Navigate to Administration > Marketing > Claims > System Parameters and verify if Set of Books field and all other required fields are populated.

c. Navigate to Claims. Create a new claim. Claim Owner, due date and GL date should default to the settings provided (noted above in step b) All LOVs should be populated with at least one value.

d. Settle the claim created above by issuing a Credit Memo and running AutoInvoice. If AutoInvoice runs successfully, a Credit Memo will be created in Oracle Receivables.

6 Administration Set Ups

This chapter provides a list of Administration Setups. These actions should be taken after the setup of the various tabs within the application. See the table below for a list of the setups and whether they are required.

Step	Required	Description
6.1 Creating Marketing Mediums	Optional	Create Marketing Mediums for campaign execution channels.
6.2 Creating Metrics	Optional	Create metrics for measuring marketing activities, costs, and results.
6.3 Creating Venues	Optional	Create Venues for Event locations.
6.4 Creating Categories	Optional	Create Categories for various marketing objects.
6.5 Creating Custom Setups	Required	Create setups for various marketing objects to determine the available item on the Side Navigation Menu as well as indicating which objects require approval.
6.6 Creating Activities	Optional	Create Activities for marketing objects.
6.7 CreatingUser Status	Optional	Create Statuses to track the changes in marketing objects.
6.8 Creating Locking Rules	Optional	Create Locking Rules to select those fields which will be locked from update after creation of the marketing object.
6.9 Creating Mandatory Rules	Optional	Create Mandatory Rules to select those fields which are required before a marketing object may be created.
6.10 Creating Approval Rules	Required	Create Approval Rules for marketing objects and select the approvers.

Step	Required	Description
6.11 Creating Web Offer Queries	Optional	Creates Web Offer Queries
6.12 Creating Date Sources	Optional	Create Data Sources to access data from TCA or outside data sources.
6.13 Creating Word Replacement Rules	Optional	Create Word Replacement Rules in TCA. These assist in removing duplicate entries by creating standard word comparisons.
6.14 Creating Geography	Optional	Create Geography, both location types and geographic areas to specify the geographic structure for the organization. **Note:** Run the Concurrent Manager Program, Load Geographic Hierarchies, any time Geography is modified.
6.15 Creating Budget Adjustment Types	Optional	Create Budget Adjustment types.
6.16 Creating Budget Thresholds	Optional	Create Budget Thresholds to generate notifications based on budget utilization.
6.17 Creating Claim Actions	Optional	Create Claim Actions to group one or more tasks together. Claim Actions used with Reasons. This is required for Trade Management.
6.18 Creating Reasons	Optional	Create Reasons for claims. This is required for Trade Management.
6.19 Creating Claim Types	Optional	Create Claim Types for Claims. This is required for Trade Management.
6.20 Creating System Parameters	Optional	Create System Parameters for Claims. System Parameters contain GL account codes and additional information for the prosecution of claims. This is required for Trade Management.
6.21 Creating the Trade Profile Item for Organization and Account	Optional	Creates the Trade Profile item in the Side Panel Menus of Sales Online's Account page and Organization page.

6.1 Creating Marketing Mediums

Marketing Mediums are used to set up execution channels for campaigns.

Prerequisites

None

Steps

1. Navigate to Administration > Marketing > Marketing Mediums.
2. Click Create.
3. Assign a Name to the marketing medium.
4. Select the Country where the marketing medium is located.
5. Select a Rating from the following: Excellent, Very Good, Good, Moderate, Bad.
6. Select an Activity which will use the marketing medium.
7. Select the person managing the marketing medium.
8. Select Active To and From Dates.
9. If applicable, select a Preferred Vendor to associate with the marketing medium.
10. If applicable, select a Party to associate with the marketing medium.
11. Enter a description.

6.2 Creating Metrics

Use

Metrics are how campaign costs, responses, revenues, and allocations are measured. Although costs and revenues are treated separately, costs are another form of metric.

Seeded Metrics

Please refer to Appendix K for a list of Seeded Metrics.

Steps

1. Navigate to Administration > Marketing > General > Metric.
2. Click Create.
3. Enter a Name for the metric.
4. Leave enabled checked in order for the metric to be used.

5. Select a Category from the Seeded List, or see Creating Categories for steps on how to create additional metric categories.
   - Allocation
   - Cost
   - Response
   - Revenue
   - Leads
   - Opportunities
   - Order Amount
   - Registrants
   - Attendees
   - Cancellations
   - Other
   - Any
6. Select a Sub Category if one is available. Seeded sub categories, available for the Cost category only, are:
   - Campaign Cost
   - Deliverable Cost
   - Distribution Cost
   - Event Cost
   - List Cost
   - Miscellaneous Cost
7. Select a marketing object from the Used With drop down menu:
   - Campaigns
   - Campaign Schedules
   - Deliverables
   - Events
   - Event Schedules

- One-Off Event
- Programs (for historical purposes only, metrics are no longer available for programs)
- Any (Summary and Rollup metrics are restricted to the Any selection)

8. Select a Return Value, either a numeric value or a ratio.
9. Enter a Description for the Metric.
10. Under the Calculation section, select how the metric is to receive its input values. For more information, see Function Metrics.
    - Values entered manually.
    - Values roll up from lower level. A rollup metric receives its values from lower level marketing objects. A rollup metric must have the same category as all of its child metrics.
    - Values summarize. Summary metrics total values at the marketing object level. Summary metrics may have subordinate metrics of any type (summary, manual, rollup or function). Summary metrics should be created to total the manual metrics at that marketing object level. The user does not assign summary metrics explicitly, but rather the summary metric is assigned automatically when its corresponding subordinate metric is assigned to a marketing object. Values of summary metrics can not roll up.
    - Values calculate using a program. Enter the name of a custom PL/SQL function or stored procedure. The function must accept a numerical parameter of activity metric ID and return a numeric value. The stored procedure takes the marketing object type and the object id as its optional parameters and does not return any values. The function or stored procedure name must be the full name which includes the schema name, the package name, if any, and the module name.
    - Values calculated using a metric. Only Revenue or Cost metrics may be selected. Click Go to display a list of metrics from which to choose. The metrics on the list are those of non-cost or non-revenue type which are used for the same type of marketing object. Once this type of metric is attached to a marketing object, the actual value will be the product of the unit value of itself and the actual value of the metric it uses to calculate. Users enter forecast values into this kind of metric.

11. Select Summarize Metrics:

    a. Summarize to Parent. Select a metric at the parent level. The value of the metric being created will roll up to this metric if the same metric is attached to parent and child marketing objects, respectively.

    b. Summarize at Same Level. Select a summary metric at the same level for this metric. The value of the metric being created is summarized to this metric. However, both metrics will always be attached to the same marketing object.

12. Testing for Metric Implementation.

    a. Navigate to Administration > Marketing > General > Metrics. Verify that seeded metrics are displayed.

    b. Click Create.

    c. Enter values to create a new metric called “My Total Costs”. Use Costs as the Category, no Subcategory; Use With Any, Return Value of Numeric, Calculation Type of Summary, and no Summarize To. Click Create. Review the metric specifications on the Metric summary page.

    d. Create a Rollup Metric called “My Rollup costs”. Use Costs as the Category, no Subcategory, Use With Any, Value of Numeric, Calculation type of Rollup from Lower Level, and select Summarize To At Same Level. Click Go and select the metric “My Total Costs”. Click Create. Review the metric specifications on the Metric summary page.

    e. Edit “My Rollup Costs” by clicking on the hyperlink on the summary page. Select the “Summarize to, Of the Parent” field. Click Go and select the same Metric. Click Update.

    f. Create a Manually Entered Metric in the same manner with the name “My Manual Costs”. Use Costs as the Category, no Subcategory, Use With Campaigns, Return Value of Numeric, Calculation type of Select Calculation type of Enter Value Manually. Select Summarize of the Parent and select “My Rollup Costs”. Also select Summarize at Same Level and select “My Total Costs”. Click Create.

    g. Navigate to Campaigns. Select a campaign and select Costs and Revenues from the Side Navigation Menu. Create a new cost for the campaign by selecting the “My Manual Costs” metric and entering values in the forecast and actual columns. Optionally, enter Transaction Date and Description. Click Create.

h. Click the Refresh button to total the values up in the summary metric. Note if the currency for the manual metric is different from the currency for the marketing object, the currency will be converted and displayed in the currency of the marketing object.

i. Test the view option by selecting Input Only and click Go. The display should show My Manual Costs without the hierarchy folders. Selecting Function Only or Rollup Only should not display any rows. (Unless values have been entered at the campaign schedule level, or other metrics were added previously.)

Metric Chart Prerequisites

In order for metric charts to display, an X Server must be configured:

1. To enable run-time image generation for charts on Unix, specify the X Server used to generate dynamic images. This server does not have to be a dedicated server for Applications; however, it does need to be accessible by the Apache server that calls it. This is done through "xhost +", or through a more secure "xauth" Unix command. A Windows NT Machine can be used that is running a Unix emulator like Exceed. See the man pages for "xhost" and "xauth" for more information. Note: This step is not required if you are installing the JTF framework on a Windows based operating system (Windows NT or Windows 2000). To implement the Display Server identifier update <ORAHTTP_TOP>/Jserv/etc/jserv.properties with the following changes:

2. Add the following DISPLAY parameter immediately below the wrapper.bin variable.

   wrapper.env=DISPLAY=<xserver-hostname>:<xserver-displayport>

3. Replace <xserver-hostname> and <xserver-displayport> with the machine name and port number where the X Server is running. For example, 'wrapper.env=DISPLAY=myxserver.mycorp.com:0'.

   This step is required if Apache Jserv is started in the Automatic mode. If Jserv is started in Manual mode then set the DISPLAY environment variable, either in the script that starts the jserv or on the shell that (re)starts Apache.

   setenv DISPLAY <xserver-hostname>:<xserver-displayport>

Known Issues or Conflicts

Currency values are rounded to the “Minimum Accountable Unit”, according to the GL definition. Internally metrics converts values to a “Functional Currency”. The functional value is converted from the entered currency to the functional currency.

Rounding occurs at this point, potentially losing precision. The functional value is stored with extended precision. That is, three extra digits of precision are stored. Summary and Rollup metrics convert the value to the currency used for the currency object, and rounded to the Minimum Accountable Unit. The value may have changed slightly due to the rounding.

The current release only supports a maximum of rollups of 50 levels of rollup in the marketing object hierarchy.

Notes

1. Manual Metrics:
   - Select this type of metric to enter values manually.
   - Only Cost and Revenue category metrics use currency, other metric categories are entered as integer values.
   - When a currency value is entered, the amount is rounded according to the Minimum Accountable Unit as determined by the GL Currencies.
   - Each metric is optionally assigned a Summary Metric, which totals values within the same marketing object. When the manual metric is assigned to the object, the summary metric is also assigned.
   - The summary metric must have the same category as the manual metric, and have the same marketing object type.
   - Each metric is optionally assigned a Rollup Metric, which totals value at the parent business object. When the values of a marketing object are refreshed, the rollup metric is either created at the parent level, or if the appropriate rollup metric exists, a link is made so the rollup can determine which values to total.
   - Rollup Metric must have the same category as the manual metric.
   - Each manual metric can be assigned to an object multiple times. A transaction date and description distinguishes each entry.
2. Function Metrics:
   - User selects this metric to calculate the actual value via a custom PL/SQL function or stored procedure. Forecasted values are manually entered.
   - Enter the name of the function to execute in the text field. Include any schema name or package in which the function is included.
   - Do not include parentheses or parameters.

- The PL/SQL function must have one numerical parameter being the activity metric ID.
- On execute, the function is passed the activity metric ID.
- The return value is updated as the transaction actual value.
- In the case of a currency, the return value must be in the default currency as defined in the activity metric record. See AMS_ActMetric_PVT.Default_Func_Currency.
- Alternatively, a procedure entered into the text field is executed once each time the engine is run or the refresh button is clicked. The procedure takes the following fields:
- P_ARC_ACT_METRIC_USED_BY (the object type) optional.
- P_ACT_METRIC_USED_BY_ID (the object ID) optional.
- When the object type and object ID fields are NULL, then all the relevant activity metric records are updated for all marketing objects.
- When the object type and object ID are set, only the records for that object are updated.
- When implementing a procedure to use for metrics, use a bulk update to set the TRANS_ACTUAL_VALUE and FUNC_ACTUAL_VALUE appropriately. This maintains a high degree of performance for metric calculations. Currency conversions must be done explicitly by the procedure.
- Also, update the LAST_UPDATED_DATE, and increment the OBJECT_VERSION_NUMBER.
- Make sure the currencies are converted according to the current date.
- Other functionality is the same as Manual Metrics.

3. Summary Metrics:
   - Summary Metrics total values at the marketing object level.
   - Values are not entered by the user, but are totaled from subordinate metrics of any type (summary, manual, rollup, or function).
   - Cost or Revenue category displays the amount in the currency as determined by the marketing object. Refresh of the metrics at the marketing object level changes the summary metric.

- Summary Metric is assigned automatically to the marketing object when the subordinate Manual metric is assigned. It can not be assigned to the marketing object by the user.
- Summary Metrics can not be rolled up to the parent level. This helps maintain the detail at each object level, while being able to summarize at each level.
- Summary Metrics always have a Used With field value of Any.

4. Rollup Metrics:
   - Used to total values at successive marketing object levels.
   - Values are totaled from the child marketing objects.
   - Manual and Function Metrics are assigned to a Rollup Metric so the results can be propagated to parent marketing objects.
   - Rollup Metrics may be assigned to themselves so that any hierarchical marketing object structure will collect all values from subordinate objects.
   - Values cannot be entered. All values are totaled from the child level.
   - Rollup Metrics always have a Used With field value of Any.
5. Variable Metrics:
   - This is an extension of the Manual Metrics.
   - The category can only be for Revenue or Cost metrics.
   - Actual values are determined by multiplying a unit value times the number of units.
   - To set up, create a non-cost or revenue metric as the multiplier with the calculation type of Manual.
   - Select the calculation type of 'Calculate Using Metric'.
   - Click the 'Go' button display a list of non-cost or revenue metrics with the same 'Used With'.
   - Select one.
   - When associating the metric to a business object, select variable metric from the cost item on the Side Navigation Menu.
   - The corresponding non-cost or revenue metric is automatically generated when the variable metric is assigned to a marketing object. Deletion of one

of these pair of metrics for a marketing object causes the deletion of the other metric if business logic allows.

- Enter the unit value.

6. Metrics Concurrent Engine.

   Set up the Concurrent Manager for Metrics:

   a. Switch responsibility to Oracle Marketing Administrator.

   b. Navigate to Applications > Functions > Setups > Concurrent Requests.

   c. Click Submit a New Request.

   d. Select the Concurrent Manager Program: AMS - Metrics refresh program.

   The Metrics Refresh Engine utilizes PL/SQL features to quickly and correctly, roll up values. Steps used to process the refresh are:

   - A check is made to see if any rollup metrics are missing. That is a metric defined with a rollup parent, and the associated activity metric does not have a rollup parent.
     - If so, the rollup is created and the activity metric is updated to point to the new rollup metric.
     - Alternatively, if the rollup parent exists, the activity metric is update to point to the existing one.
   - All activity metrics marked with a dirty flag (indicates values may not be correctly totaled) are read into memory.
   - All parent activity metrics of the dirty metrics are also read into memory.
   - Each node in the dirty tree is calculated from the leaf level up.
   - Totals are kept in memory until the operation is completed.
   - On completion, values are bulk updated into the activity metrics table and the dirty flag is reset.
   - This process is split into two parts: Rollups and Summaries.
   - An optional parameter, Update_History has been added. Set to Y or N to indicate whether metrics history should be updated.

7. Programs cannot have new manual and function metrics associated with them. However, Programs have been migrated from Rollup Campaigns, which did allow for manual and function metrics. Historical manual and function metrics are supported for Programs. These values may be modified, but new manual

and function metrics are no longer allowed. Programs allow for rolling up values from marketing objects.

6.3 Creating Venues

Venues are locations for Events.

Prerequsites

None

Steps

1. Navigate to Administration > Marketing > Venues.
2. Click Create.
3. Assign a Name to the venue.
4. Select a Venue Type.
5. Select Internal if the venue is internal to the organization.
6. Select Active if the venue is available to use for Events.
7. Enter a description.
8. Enter a capacity.
9. Enter an Area value and select a measurement.
10. Enter a Ceiling Height value and select a measurement.
11. Enter a Cost and select unit of time.
12. Select the Currency for the Cost entered above.
13. Enter Address information for the venue.
14. Enter any additional information.

6.4 Creating Categories

Use

Categories are used to group objects. They can be used as selection/search criteria to search on objects. In some objects like budgets, categories can be used to impose some business rules. Categories can be used in the following marketing functional areas: Deliverables, Events (events, event schedules & one-off events), Budgets and Metrics. A few categories comes seeded with the product for deliverables and metrics. These may be expanded to fit the organization's Business Rules.

Categories and Deliverables

Categories are used by deliverables to group them together. While creating a deliverable it is mandatory to choose the category to which it belongs. Examples of deliverable categories are: Collateral, Creative, or email. Additionally you can create sub-categories to define deliverable a further level of deliverables. For example, you can define greetings or confirmation as sub categories under the email category. Email is a special category of deliverables. These will be used by campaign schedules to send as email when attached through the Email content screen in campaign schedules

Categories and Events

Categories are used with events to group or categorize them. Examples of event categories can be educational events or partnered events.

Categories and Metrics

Category is used by metrics to classify the metrics. You can have different categories of metrics such as cost, revenue, leads or opportunities. When you create a rollup or summary metrics, the system makes sure that metrics rollup or summary to the metrics of the same category, cost metrics rollups to cost metrics.

Categories and Budgets

Budgets use categories to integrate to GL (General Ledger). Budget categories can also be used to verify budget eligibility for campaign schedules.

Link between Categories and Approval Rules

Approval rules for deliverables can be linked to deliverable categories.

Approval rule for budgets can be linked to budget categories. This would mean that all budgets that fall with that category would use that particular rule for approval when drawing money from those budgets.

Link between Categories and Custom Setups

Custom setups for deliverables can be created for using deliverable categories. This means that all deliverables which use that category will use the custom setup created for the category attached.

Prerequisites

None

Steps

Step	Required	Description
1. Create Categories	Yes	Categories are required to create deliverables, metrics and budgets. It is optional for events.
2. Test Creation of Categories	Yes	Test if categories have been created.

1. Create Categories:
   a. Log in to Oracle Marketing Online.
   b. Navigate to Administration > Marketing > Setup > Categories.
   c. Click Create.
   d. Enter a Category Name.
   e. Select a Parent Category if desired.
   f. Select the Enabled checkbox to make the Category available.
   g. Select a marketing object from the Created For drop-down menu.
   h. Enter a description.
   i. In case of metrics or deliverables make sure the parent–child relationship is captured correctly.
   j. In case of budgets define the following:
      - Correct GL account codes for expense account and liability account. These accounts will be used for posting. The Sales/Expense/Charge Account and the Accrual Liability Account are account flexfields. When a posting is made to one of these two accounts, the numeric identifier for each component of the flexfield is obtained, through a workflow process, and the account number is created. If an account with that number does not already exist, it is created.
      - Enter an appropriate prefix. These are used as a prefix for the budget numbers that are generated automatically.

- Enter valid activities. This is optional. (Note that activities can be created through the activity screen in Administration. Refer to the activity setup section on how to create activities.) Activities defined here will be used to evaluate budget eligibility of campaign schedules. For example, if campaign schedule X is using Activity A, Budget B is using category C. Then campaign schedule X can draw money from Budget B only if category C has activity A assigned to it. If Category C does not have any activities assigned to it. This would mean that this budget is open to all and not subject to activity restrictions. Organizations can use this functionality to restrict budgets for direct marketing, advertising or other activities.

k. Click Create.

Note: Oracle Marketing Online contains seeded categories for deliverables and events. Disable categories that are not needed.

---

2. Test Creation of Categories:

   a. Navigate to the Deliverable tab and click Create. Verify that the Category and Subcategory fields display values in the drop down menu.

   b. Navigate to the Budget tab and click Create. Check if the Category field displays values in the drop down menu.

   c. Navigate to the Events tab and click Create. Create an event. Navigate to the Categories item on the Side Navigation Menu. Verify that Category field displays values in the drop down menu.

   d. Navigate to the Administration > Marketing > General > Metrics. Verify that the Category field displays values in the drop down menu.

6.5 Creating Custom Setups

Use

The Custom Setup area within Administration dictates and drives how an organization will use marketing objects. Marketing objects for which custom setups may be created include Campaign, Campaign Schedule, Collection, Deal, Deliverables, Event, Event Schedule, Event Promotion, Offer, One-Off Event, Price List and Trade Promotion.

Custom setups enable an organization to use marketing objects to suit the organization's needs through customized, object specific Side Panel Menus.

A custom setup determines:

- which items appear on the Side Navigation Menu when an object is created or selected.
- the fields to be shown in the static HTML object reports on the Marketing Portal.
- which users may view the object.
- which items require budget and/or theme approval.
- the suffixes for source codes.

Note: Updated custom setup types affect all Objects of that type within the application. The update is restricted to newly created objects of that type. For example, if a deliverable is associated with a Campaign and the deliverable Side Navigation Menu item is disabled on the 'Custom setup', the deliverable item for currently existing objects will not be visible to users. If the deliverable item is enabled again, then the associated deliverable will become available.

Terminology and Seeded Values

Side Navigation Menu. This is the vertical menu which appears on the left hand side of the page, once an object is created. Note: The side panel menu does not appear until you create a new object.

Menu Items. These are the smallest components on the Side Navigation Menu. The following menu items are seeded with the application:

- Main
- Messages
- Geographies
- Products
- Deliverables
- Budget
- Teams

- Contact Points
- Triggers
- Schedule
- Offer
- Tasks
- Notes

Each of the menu items refer to a different page. Menu items are the functional areas within the application where data can be created or object details view. While some of the menu items have functional implications, others are used for information purposes only. The Main item is displayed when an object is first accessed.

Component Groups. Each of the menu items are logically grouped into various sections based on functionality.

Component Groups include Planning, Execution, Tracking, Collaboration and Approval. Within each Component Group is a logical collection of menu items. An example is shown below:

Planning

Main
Messages
Geographies
Partners
Products
Deliverables
Budgets

Execution

Schedules
Offers
Triggers

Tracking

Costs
Metrics

Collaboration

Contact Points
Attachments
Notes
Tasks
Team

Approval

Theme
Budget

Steps for creating Custom Setups

Creating Custom Setups involves first creating the Custom Setup and then selecting the menu items associated with it. While some Custom Setups are seeded, others may be created.

1. Navigate to Administration > Marketing > Setup > Custom Setup.
2. Create a Setup Name.
3. Associate the custom setup with a marketing object.
4. Depending on the marketing object selected, additional fields such as Activity Type and Activity may appear. This indicates that the custom setup is valid for the specific combination. The selection of the Activity Type and Activity will modify the available Component Groups and Menu Items. For example, Direct Marketing - Email will have a different set of Component Groups and Menu Items as compared to Direct Marketing – Direct Mail. For more details, see Creating Activities.

   The available combinations of Activity Type and Activity in the Create Custom Setup page depend on the definition of the organization's Activities, Activity Types and Categories. In the case of Deliverables, the combination of Activity Type and Activity is based on the parent and child category. See Creating Categories. Custom Setups for Campaign Schedules depend on the relationship of Activity Type and Activity.

   > **Note:** Activity Types for Events are defined in the Lookup AMS_EVENT_TYPE.

5. Associate the Custom Setup with one of the following marketing objects. This field is mandatory.
   - Campaign

- Campaign Schedule
- Collection
- Deal
- Deliverable
- Event
- Event Schedule
- Event Promotion
- Offer
- One-Off Event
- Price List
- Trade Promotion

6. Mark Active – Only Active custom setups will show up at object creation.
7. Set Suffix - The suffix set here is reflected when an object is created. The suffix can be alpha, numeric or a combination. The maximum number of characters in a suffix is 3. This field is optional.
8. Select Menu Items.

   The option to select menu items appears when a custom setup is created.

   The combination of menu items show up based on the Object, Activity Type and Activity combination.

   a. Select a Component Groups from those listed above.
   b. Select a Display Sequence. This dictates the order in which the menu items are displayed within a component group.
   c. Select Components. These are all the menu items available to be selected. These are seeded within the application. Menu items not shown are not available.
   d. Available Attributes. Components may be selected or deselected on the basis of these checkboxes. Deselected menu items do not appear on the object side panel menu.
   e. Mandatory. Once components are made mandatory, those components cannot be disabled. The only recourse would be to inactivate the custom setup and create a new one with modified components and criteria.

f. Show in Reports. This checkbox will decide the attributes shown in the portals and for locked objects.

g. Approvals. Approvals can be selected or deselected for Theme and Budget. Objects using custom setup with 'Theme' and 'Budget' disabled do not go through approval process. Theme and Budget approval can be selected or deselected independent of each other. Please refer to Creating Approval Rules for more information on the approval process.

Custom setups are selected from the respective create object pages. While some custom setups are seeded, additional setups may be created or existing setups may be modified to meet the organization's Business Rules.

6.6 Creating Activities

Use

The Activity page within the Administration tab manages the relationship between an Object's Activity Type, Activity and available Marketing Medium. It is in this area where an Organization can specify the available Activity and Marketing Mediums combination for a given Activity Type.

Activity Types are seeded and cannot be created. These values come from a system lookup. Activities can be created within the application and can be linked to an existing Activity Type.

When an Activity Type is selected for a Object Create or Custom Setup, the Activities that has been created for the Activity Type will populate the Activity LOV.

The available Activity Types are:

- Advertising
- Direct Marketing
- In-Store
- Press and Analyst Relations
- Web Marketing
- Events

The seeded Activities for each Activity Type are:

Advertising

Banner Ads
Billboards
Brochures/Booklets
Directories
Display Signs
Magazine
Motion Pictures
Netcast
Newspaper
Posters/Leaflets
Print Ads,
Radio
TV

Direct Marketing

Catalog
Direct Mail
Email
Fax
Magazine Insert
Telemarketing

In-store

Display
End-Aisle
Grounders
Kiosk
Menu Boards
Package-Inserts
Packaging-Outer
Point-of-Purchase Displays
Shelf
Shoparound

Press and Analyst Relations

Article
Briefing
Community Relations
Company Magazine
Crisis Communications
Internal Communications

Investor Relations
Lobbying
Press Conference
Publications
Release
Tour

Web Marketing

Advertising
Promotions

Note: The list of activities for event activity type will come from the lookup AMS_ACTIVITY_TYPE. You will not be able to add new activities here. You will be be able to add new activities through this lookup.

Note: Custom defined activities are not available for the Activity Type of Web Marketing.

Steps for creating an Activity

1. Navigate to Administration > Marketing > Setup > Activity.
2. Create a Activity Name.
3. Select an Activity Type.
4. Mark Active. Only Active Activities are available within the application.
5. Associate Marketing Medium (see Creating Marketing Mediums):
    a. Click Go.
    b. Select a Marketing Medium from the list of active Marketing Mediums displayed.
    c. Select Active From and Active To dates. These dates should fall within the Active From and Active To dates of the Marketing Medium.
    d. Marketing Medium shown up on the Object details page based on the Association of the Marketing Medium with the various activities in the create Activity screen. A single Marketing Medium may be associated with multiple Activities.

6.7 Creating User Statuses

Use

The User Status setup in the Administration tab enables configuration of the values of the object's Status field. This helps usability and analysis of objects within the application. This functionality facilitates the extension of object statuses within the application.

Usage Example

Consider a Campaign with a System Status of Cancelled. The seeded User Status for Campaign with Status Cancelled is Cancelled. This means that when a Campaign's Status moves to Cancelled, the UI Status field reflects the value Cancelled.

The User Status functionality allows organizations to extend this status of Cancelled to imply and record the cause of the cancellation. This can be done through the User Statuses.

The System Status can be extended using User Status to enhance the analysis and reporting functionality. One such method would be to add a cancellation reason to the Cancelled status.

For example:

- Cancelled – ROI Below Expectation
- Cancelled – Competitor Campaign
- Cancelled – Product Overlap
- Cancelled – Executive Rejection

These User Statuses can provide users with information in addition to the seeded status.

User Statuses can be created for the Campaign 'Cancelled' status to indicate the cause of the cancellation. The default user status will show on the object upon cancellation but the campaign can be later updated to reflect the appropriate reason.

User statuses can be created for the following seeded statuses:

Budget Sourcing Status
Budget Status
Campaign Schedule Status
Campaign Status
Claim Status

Deliverable Status
List Import Status
List Status
Marketing Event Agenda Status
Marketing Event Registration Status
Marketing Event Speaker Status
Marketing Event Status
Model Status
Offer Status
Price List Statuses
Program Status
Score status
Segment Status

All the Enabled User Statuses will be available in the Campaign Status LOV. Seeded User Status Values are marked Enabled and Default. This means that the System Status Value will show up for objects as the Default value.

System Status Values cannot be disabled.

New User Status Values can be created. Once a new User Status is created for a combination of Activity and Status and marked enabled, the seeded System Status Value automatically looses its default flag. There cannot be two default User Statuses for given combination of Activity and Status.

Steps for Creating User Statuses

1. Navigate to Administration > Marketing > Setup > User Status > Create.
2. Select a marketing object for the User Status For field.
3. Select a System Status for the marketing object.
4. Enter a User Status to replace the System Status for the marketing object.
5. Select the Enabled checkbox to make the User Status available.

> **Notes:** Multiple Users Statuses may be created and enabled for a particular System Status.
>
> All the functionality and rules associated with the System Status will be applicable for the User Status created for that combination.

6. In order to set this User Status as a default, the Default check box needs to be checked in the overview screen for one of the newly created User Status, if not,

the seeded User Status will be reflected on the Campaign. On update, the default value on the seeded User Status is automatically removed.

7. See Appendix N for a list of seeded User Status values and the marketing objects to which they apply.

6.8 Creating Locking Rules

As marketing objects transition from one status to another, certain aspects of the marketing object must be locked to prevent modification in the future. The Locking Rules determine which fields are no longer updatable as a marketing object achieves a new status.

6.9 Creating Mandatory Rules

The Mandatory Rules help the user interface respond to object transitions. For each marketing object, certain attributes are required to define it. The Mandatory Rules dictate which attributes of a marketing object are required.

6.10 Creating Approval Rules

Use

Approvals can be used for budget and concept approval of all objects created within the Oracle Marketing Online application.

Marketing Objects include: Campaigns, Campaign Schedules, Events, Event Schedules, One-Off Events, Offers, Deliverables, Pricelists, and Claims.

Budget Lines Requests and Budget Transfer approvals used to approve finances or funds used by the Objects.

Root Budget Approvals are used for Approvals on ‘Budget’ creation.

Object Approval is used as a final approval after ‘Concept’ and ‘Budget Line’ Approval

Terminology

Concept Approval. This is done prior to approving any finances for the Object. The requirement of ‘Concept’ approval for any Object is based on the ‘Custom Setup’ used for creating the Object.

Budget Line Approval. This refers to the method in which the money / expense associated with an 'Object' is approved. The requirement of 'Budget Line' approval for any Object is based on the 'Custom Setup' used for creating the Object. This approval is guided by the budget category used while creating the budget.

Budget Approval. This is the final approval for an 'Object'. This happens after the 'Theme' and 'Budget Line' approvals are met. The execution of this approval depends on the budget 'Threshold' being met. See Profile Option, AMS Threshold Percentage.

Budget Request Approval. This type of approval is related to the Budget Transfers. Budget transfers are used to transfer funds between two budgets.

This approval is guided by the budget category used while creating the budget which the funds are being sourced from. Note: Child budget creation is also similar to the budget request approval.

Root Budget Approval. When a Budget is created in the Application, It cannot go 'Active' and be used by other objects without going through the 'Root Budget Approval'. Any Budget without a parent is a 'Root Budget'

The approvals functionality will enable an organization to control the use and approval processes for all objects and involved finances.

A Typical Approval within Oracle Marketing Online will go through:

- Theme, Budget Line and Budget Approval for Objects.
- Root Budget, Budget Requests for the creation of Budgets and Budget Transfers.

Overview of the Approval Process

If the Custom Setup selected for the marketing object requires both theme and budget approval, this is how the approval process will proceed.

1. An object goes through Concept approval when the object's status is changed by the user from New to Planned.
2. Upon the next running of the concurrent process, the Concept approval is sent to an approver based on Approval Rules. At this time the object's status goes to Pending Theme Approval.
3. Approver approves the request.
4. On approval, the object's status goes to Planned.

5. When the user changes the object's status from Planned to Active, the object goes through Budget Line approval.
6. Upon the next running of the concurrent process, the Budget Line approval is sent to an approver based on Approval Rules. At this time the object's status goes to Pending Budget Approval.
7. Once the threshold limit is reached, based on the AMS Threshold Percentage, the Budget approval is sent automatically. It does not require a concurrent process. At this time the object's status is still at Pending Budget Approval.
8. The Budget approval is sent to an approver based on Approval Rules. Depending on the approval, the object's status will go to Active or Rejected.

The table below summarizes the necessary steps to successfully create Approval Rules. Further information detailing the implementation procedures is provided in the sections following the table.

Steps

Step	Required	Description
1. Set up Role Types	Yes	Creates Role Types required for approval process.
2. Set up Roles	Yes	Create Roles and assign to a users.
3. Set System Profiles	Yes	Set values for AMS Threshold Percentage and AMS Source From Parent.
4. Create Approval Rules	Yes	Create Approval Rules and assign Approvers to them.
5. Set up Concurrent Manager Programs	Yes	Sets up the Workflow Background Process
6. Test Creation of Approval Rules	Yes	Verify that the Approval Rules work.

1. Set up Role Types.

   The Role Types that need to be set up are

   - Default Marketing Approver
   - Marketing Approver

The Default Marketing Approver is the default approver of any new marketing object requiring approval. Marketing Approvers are approvers specified by the Approval Rules.

a. Log into Forms with CRM Administrator responsibility.

b. Navigate to Setup > Role Types

c. Use Find to check for the role type of AMSAPPR. If the role type does not exist, it must be created. If it does exist, skip to step i.

d. From Menus, select New to create a new line.

e. Under the Code column, enter AMSAPPR.

f. Under Meaning, enter Default Marketing Approver.

g. Under Description, enter Default Marketing Approver.

h. Save the record.

i. If more than one person in the organization will be approving marketing objects, create a role type called Marketing Approver.

j. Use Find to check for the role type of MKTGAPPR. If this role type does not exist, it must be created. If it does exist, skip to step 2.

k. From Menus, select New to create a new line.

l. Under the Code column, enter MKTGAPPR.

m. Under Meaning, enter Marketing Approver.

n. Under Description, enter Marketing Approver.

o. Save the record.

2. Set up Roles.

The role of Default Marketing Approver must be created and assigned to a user in order for Oracle Marketing Online to function properly. The Default Marketing Approver receives approval notification for any marketing object not meeting the criteria specified in the Approval Rules.

Important Note: The Default Marketing Approver Role may only be assigned to one user. If more than one user receives this role, the approval process will fail. Note that the system will not prevent you from assigning the role to more than one user.

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a. Navigate to Setup > Roles.

b. Query to determine whether the role AMS_DEFAULT_APPROVER exists. If not, create it with the following steps. If it does exist, skip to step 3.

c. From Menus, select New to create a new line.

d. Under the Code column, enter AMS_DEFAULT_APPROVER.

e. Under Name Type, enter Default Marketing Approver.

f. Under Type, use the LOV to select Default Marketing Approver or the description you gave the Default Marketing Approver Role Type in Step 1.

g. Under Description, enter Default Marketing Approver Role.

h. Select the checkboxes Active and Manager.

i. Save your work.

j. Assign this role to a valid user. See Assigning a Role in User Setup.

3. Set System Profiles.

   a. Switch responsibility to System Administrator.

   b. Navigate to Functions > Profile > System.

   c. Enter the profile name in the Profile field and click Find.

   d. Enter the appropriate value in the column corresponding to the level indicated.

   e. Save your work.

See the table below for System Profiles and their values.

Option	Required	Level	Setting	Effect/Limitation
AMS Threshold Percentage	Yes	Site	Enter a value between 0 and 100	For a marketing object with an Initial Estimated Amount (IEA) value entered into the Budget page for that object to go to Active status, it must obtain budget approval for this percentage of the IEA. During the initial stage, before the object status is Active, requests in excess of the IEA are not allowed. For example, an object with an IEA of $1,000 and an AMS Threshold percentage of 60, requires approval of $600 in order to become Active. The same object in an organization with an AMS Threshold of 100, requires approval of $1,000 to become Active.
AMS Source from Parent	Yes	Site	Yes/No	Determines whether campaign schedules and event schedules are sourced from their parent campaigns and events (select Yes) or from budgets (select No). Campaigns and Events may only be sourced from budgets.

4. Create Approval Rules.

The creation process involves first creating an Approval Rule and then assigning Approvers to the rule.

- **a.** Navigate to Administration >Marketing >Setups >Approval Rules.
- **b.** Click Create.
- **c.** Enter a Name for the Approval Rule.
- **d.** Select an Approval Rule Type from the following:
    - Object: Approval Type: Concept is for 'Concept Approval'.
    - Budget Request - Approval Type: Budget is for 'Budget Line Approval' (this is for funds requested from a Budget). This is when you request funds from a budget. This is the rule that will apply for ‘Budget Transfers’ and Child Budgets. **Note**: Budget Requests for Transfers and Child Budgets will follow the above rule.

- Budget Transfer is used while transferring funds from one budget to another.
- Root Budget - Approval Type: Budget is for 'Root Budget Approval'.
- Campaign/Event - Approval Type: Budget is for 'Overall Object Approval' (this is the third approval after the threshold is met). It is after this approval that the object’s status will go ‘Active’.

Notes:

Approvals will go through in the following order for a typical approvals process depending on Custom Setup Types explained in Creating Custom Setup Types: Concept followed by Budget lines followed by 'Budget'/’Object’.

Approval Rules are exclusive to the Rule created. The approvals can be made more specific by using criteria like Priority, Organization, Business Unit, Amounts / other fields in the UI.

Budget Line Approvals do not have a Priority. Priority is assigned at an ‘Object’ level. This means that the ‘Priority ‘set for the object will determine how the budget line approvals flow.

Approval rules can be designed based on a single or a combination of criteria such as BU, Priority, Custom Setup, Activity, Amount based on the Marketing Object which are available in the Create Approval Rules Page.

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e. Assign Approvers. Approvers can be assigned by Role, by User, function or a combination of all three. The functions in use will be functions such as 'Object Owner', 'Parent Object Owner', or 'Budget Owner'. These are similar to approval roles but are different in the sense that they are dynamic based on each 'Object' and do not have to be assigned to a 'User'.

If the approval needs to be sent through a chain of approvers, The approvers need to be set in an order.

For example, an advertising budget for which there are three approvers for the ‘Budget Line Approval’. After the rule is created, the approvers need to be added to the rule in the order in which they are expected to approve. Approver with Order [1] will be the first approver followed by Approver with Order [2] and so forth.

5. Set up Concurrent Manager Programs:
   a. Log into Forms as the Implementation User.
   a. Switch responsibility to System Administrator.
   b. Navigate to Applications > Functions > Setups > Concurrent Requests.
   c. Click Submit a New Request.

See the table below for concurrent managers and descriptions.

Concurrent Manager	Required	Description
Workflow Background Process	Yes	Parameters required: ■ Set Item Type: AMS Marketing Approvals for Marketing Approvals or OMO Triggers for Triggers (select from available values). ■ Minimum Threshold: Leave blank. ■ Maximum Threshold: Leave blank. ■ Process Deferred: Yes ■ Process Timeout: Yes The concurrent process is required to process the approvals. As mentioned earlier, there are three approval processes to complete: Concept, Budget Line and Budget. The concurrent process is required for Concept and Budget Line approvals. Other approvals, Budget Request, Root Budget and Object approval, occur in real time.

6. Test Creation of Approval Rules.
   a. Prerequisites:
      - Validate that the concurrent programs are up and running.
      - Validate that the PHP is up and running.
      - Identify the periodicity of the Workflow Background Process for Theme and Budget Line Approval.
   b. Create Objects with Custom Setups requiring ‘Concept’ and ‘Budget’ Approval.
   c. Create categories for Budgets and create a Budget using the Category.

d. Create Approval Rule for Root Budget using the specified Category.

e. Send the Budget through for approval.

f. Check if the Budget is Active.

g. Associate this budget to the objects created.

h. Set approval rules for the various objects.

i. Send Objects through for approval and verify that the approvals go through as expected.

j. Do the following steps at each stage:

- Check if the approval goes to the approver designated in the approval rule.
- Validate if the person requesting the approval gets a notification of forward in the PHP.
- This is done by logging into the PHP as the approver.

k. On approval through the PHP, login to the UI and check to see if the Objects in use reflect the changes made in the PHP: is the budget line ‘Approved’, and has the Object ‘Concept’ approval gone through.

6.11 Creating Web Offer Queries

Background

The Concurrent Program "AMS Web Execution: Refresh Offer Parties and Products" utilizes the queries that are setup using this page. This step has to be performed only if new Qualifier Contexts or Attributes are setup in Advanced Pricing. These queries will be used by the concurrent program to arrive at the list of parties eligible for the offer. These parties will be stored in AMS_OFFER_PARTIES denorm table. eMerchadising would utilize this table to make offer recommendations on *i*Store.

These queries are used by budget-offer validation and offer forecasting. The tables generated by Web Execution: Refresh Offer Parties and Products are used by eMerchandizing.

Defining Market Eligibilities in Offers involves setting up qualifier contexts, attributes and value sets in Advanced Pricing. The Application comes with seeded Contexts (for example, Customer Group) and attributes (for example, Lists and Segments). For all the seeded attributes which resolve a party, there will be a seeded web offer query. When a new attribute is added to a context, a web offer query has to be setup for that context - attribute combination.

Here is an example of a Marketing Eligibility query using a qualifier context:

A qualifier Context - Attribute definition: The Qualifier Context = Customer Group, the Attribute = Lists, the Associated Value Set = AMS_LISTS, the Value Set Id Column = list_header_id, and the Value Set Name Column = list_name.

A Web Offer Query for the above Context-Attribute combination would have these values:

Bind Condition Id Column: list_header_id (Same as Value as Set Id Column)

Bind Condition Name Column: list_name (Same as Value Set Name Column)

The Bind Condition Id Column will be used when "=" or "<>" operator is used while setting up the market eligibility.

The Bind Condition Name Column will be used when "Between" operator is used while setting up the market eligibility.

To create a Product Eligibility query using a product context, substitute a product context as follows:

A Product Context - Attribute definition = Product Context : Item, the Attribute = iStore Section, the Associated Value Set = AMS_ISTORE_SECTION, the Value Set Id Column = section_id

Web Offer Query for the above Context-Attribute combination:

Bind Condition Id Column: section_id (Same as Value Set Id Column)

There is no need to setup Bind Condition Name Column for a product eligibility query.

Requirements

In order to define a query correctly, the following requirements must be met:

- For a Marketing Eligibility query, the SQL statement must return only the party_id field. This SQL statement will be validated.
- For a Product Eligibility query, the SQL statement must return only the product_id field. This SQL statement will be validated.
- The Bind Condition Name Column and the Bind Condition ID Column must be valid names of columns of tables that are referenced in the SQL statement. If

multiple tables are referenced, please use a table reference format of table_ name.column_name for both of these fields.

- For a "Party Site" or "Customer Site" qualifier, the Bind Condition ID Column must use the column name or alias name of "party_site_id" or "site_use_id" respectively. If an alias is used, the literal "site" must be used.
- The combination of "Query For", "Context Name", and "Context Attribute" must be unique. The unique constraint is enforce at the API level.
- SQL Statements that query a variable from global packages must use a "*" in the select statement. For example, "select * from *Table_Name*".

Steps to create a Web Offer Query

1. Navigate to Administration > Marketing > Setup > Web Offer Queries.
2. Click Create.
3. Enter the Query For field. Queries are for Market or Product Eligibility.
4. Enter the Context Name. This is the Qualifier Context.
5. Enter the Bind Condition Name Column. This is the bind condition that creates a denormalized query.
6. Enter a Bind Condition ID Column. This is the bind condition id used to create a denormalized query.
7. Active. Select this checkbox to make the query active.
8. SQL Statement. This query associated with the context and attribute.

Steps to Update a Web Offer Query

1. Navigate to Administration > Marketing > Setup > Web Offer Queries
2. Click the context attribute of the query to be modified.
3. Enter or modify the value of the Bind Condition Name Column.
4. Enter or modify the value of the Bind Condition ID Column.
5. Select or deselect the Active checkbox.
6. Modify the SQL statement.
7. Click Update.

Set up and Run Concurrent Manager Program

1. Switch responsibility to Oracle Marketing Administrator
2. Navigate to Applications > Functions > Setups > Concurrent Requests.
3. Click Submit a New Request.

See the table below for concurrent manager programs and their descriptions.

Concurrent Manager	Required	Description
Web Execution: Refresh Offer Parties and Products	Yes	This program loads offer party and product information into denormalized tables. This information will be used in validating budget eligibility and web offer recommendations. For the input parameter p_incremental_flag, enter Y to load only new information or N to reload all information.

6.12 Creating Data Sources

Data Sources are setups for importing data from a variety of sources, including TCA.

Prerequisites

None

Steps

1. Navigate to Administration > Marketing > Audience > Data Sources.
2. Enter a Code which becomes the name of the data source setup.
3. Enter a List Source Name. This is the database which is the source of the data.
4. Enter the Object Name. The Object Name is the name of the object within the database which is providing the data.
5. Enter the Primary Key. The Primary Key is the unique identifier for each record within the Object Name.
6. Enter a Description.
7. Click Create.
8. Click the link for the Data Source just created.

9. On the List Source Types page, enter the name of the Source Field, a Description of the Source Field, and a List field name for the field in the Import Table.
10. Repeat, completing one row for each field in the data source object.
11. Click Update.

Seeded Data Sources

Oracle Marketing Online seeds two master data sources for B2C and B2B: Person_list and organization_contact_list.

For Person_list, the seeded sub type data sources are:

- Person_phone1
- Person_phone2
- Person_phone3
- Person_phone4
- Person_phone5
- Person_phone6
- Person_account_list
- Fax

For Organization_contact_list, the seeded sub type data sources are:

- Organization_phone1
- Organization_phone2
- Organization_phone3
- Organization_phone4
- Organization_phone5
- Organization_phone6
- Organization_list
- Organization_account_list
- Fax

Users may also define their own data sources, both master and sub type.

6.13 Word Replacement Rules

Follow the steps below to add new words to TCA's word replacement system.

Steps

1. Log into Forms.
2. Switch responsibility to Receivables Manager.
3. Navigate to Setup > Word Replacement Rules.
4. Select Form Name Word Replacement (ARXWRDRP.fmb).
5. Add new word replacements.
6. Save your work.

6.14 Creating Geography

Geography is created in two sections. First the Geographic Location Types are created and then Geographic Areas are created. Each Geographic Area has a Geographic Location Type associated with it.

Steps

1. Navigate to Administration > Marketing > Geography > Location Type.
2. For each of the levels, enter a Name for the type and a Description.
    - Area 1 (top level)
    - Area 2 (second level)
    - Country
    - C Region (regions within Country)
    - State
    - S Region (regions within State)
    - City
    - Postal Code
3. Click Update.
4. Navigate to Administration > Marketing > Geography > Geographic Area.

5. Select a Parent Geographic Area. The Geographic hierarchy should be created from the top down.
6. Select a Type for the child area.
7. Enter the Name, Short Name (will be used for Source Code generation), Start and End Dates (End Date is optional) for each child geographic area.
8. Click Update.
9. Repeat for additional Geographic Areas.

Note: Run the Concurrent Manager Program, Load Geographic Hierarchies, any time Geography is modified.

6.15 Creating Budget Adjustment Types

Use

This feature enables the user to make adjustments to their checkbooks. A user will be able to adjust earnings previously committed to customers who have failed to meet agreed upon activity. This frees up funds from the committed column and allows the user to commit to these funds to other activities. Budget adjustments may also be used to recover non-utilized funds from cancelled budgets.

Adjustment types may be defined in advance and then used when making adjustments to budgets.

Prerequisites

Some budgets must be made active before proceeding to view the adjustment type in the budget adjustment screen.

Steps

Step	Required	Description
1. Create Adjustment Type	Yes	Sets up different types of adjustments that may be applied to budgets.
2. Test Budget Adjustments	Yes	Test to see that budget adjustments are functional.

1. Create Budget Adjustment Type.

a. Log in to Oracle Marketing Online.

b. Navigate to Administration > Marketing > Budget > Adjustment Types.

c. Create an Adjustment Type. For example, Cost Cutting. Provide the necessary information and enter valid start and end dates. Note, Creation Sign has no functionality attached to it right now.

d. Select an Adjustment Type from the following. The transaction and validation logic of each type of adjustments is given below.

- **Decrease Budget Commitments.** A user can decrease a commitment if he has already committed for that activity. A validation would be done whether a committed amount exists for that activity or not. The adjustment amount would also be validated against the previously committed budget amount.

  Budget Commitments can be decreased only to the extent of balance left after budget utilized. There can never be negative commitments and earnings.

- **Decrease Budget Commitment and Utilization.** In addition to the above validation the following earning validation would also be done.

  To post a negative earning against a budget a positive earning must exist. If no earning exists for the budget the user is going to get a error message.

- **Decrease Budget Utilization.** The above validation for decrease earning would be applicable in this case also.

- **Increase Budget Utilization.** A user can increase earning against any budget.

2. Test Budget Adjustments.

a. Navigate to the Budget tab

b. Select an active budget.

c. Select the Checkbook item on the Side Navigation Menu.

d. Click Adjustment.

e. In the Adjustment Page click on Go next to Adjustment Type and select an adjustment.

Known Issues or Conflicts

The field Creation Sign has no functionality attached to it in this release.

6.16 Creating Budget Thresholds

Use

The Budget Threshold feature of Oracle Marketing Online Trade Management allows the user to monitor the status and balance of their budgets and provides warnings as budgets are depleted, thus reducing the likelihood that sales will over or under spend their discretionary trade promotion funds.

There are different types of thresholds. Thresholds may be based on the planned amount, committed amount, utilized amount, paid amount or budget balance. For example, if a budget has a quarterly threshold on a planned amount equal to 50% of the baseline budget and the user attempts to plan budget expenditures greater than 50% of the baseline budget, he will receive a notification indicating that he had planned to spend no more than 50% of the baseline budget in that quarterly period.

Prerequisites

Some budgets must be made active before proceeding to budget threshold.

Steps

Step	Required	Description
1. Create Budget Threshold	Yes	This sets up a budget threshold which may then be applied to a budget.
2. Create Budget Threshold Rules	Yes	Define the threshold rules which are applied to the budget.
3. Test the Budget Threshold Rule	Yes	Tests the Budget Threshold notification.
4. Run Concurrent Manager Program	Yes	Program checks budgets against budget thresholds for violations. Generates notifications of violations to budget and parent budget owners.

1. Create Budget Threshold:
   a. Log in to Oracle Marketing Online.

b. Navigate to Administration > Marketing> Budget > Threshold.

c. Create a Budget Threshold. Provide the necessary information and enter valid start and end dates.

2. Create Budget Threshold Rules:

a. Navigate to Administration > Marketing > Budget Threshold.

b. Select the above-created threshold and navigate to the details page. Create at least one threshold rule. For example, if you want to notify a owner 3 times a week when the committed amount is greater than or equal to 50% of the budget amount enter the following values in the respective fields:

- Enter Start and End Dates.
- Select a Value Limit of Committed. The Value limit is the budget column on which the threshold is based: Planned, Committed, Utilized, Paid or Balance.
- Select an Operator of '>='.
- Enter a Percent of 50.
- Select a Baseline of Budget Amount. The table below shows available choices based on the selected Value Limit.

Value Limit	Available Baseline choices
Planned	Budget
Committed	Budget Planned
Utilized	Committed Budget
Paid	Utilized Budget
Balance	Budget

- Enter a Frequency of 3.
- Select a Period Type of Week.
- Select Enabled.

3. Test the Budget Threshold Rule.

   a. Navigate to Budget.
   b. Select an active budget.
   c. Associate the above-created threshold to this budget.
   d. Navigate to Budget Details and commit more than 50% of the budget amount for this budget for a campaign or an event.

4. Run Concurrent Manager Program: AMS Validate Budget Threshold and Submit:
   a. Log into Forms.
   b. Switch to Oracle Marketing Administrator responsibility.
   c. Navigate to Applications > Functions > Setups > Concurrent Requests.
   d. Click Submit a New Request.
   e. A notification should be sent to the owner of the budget which has violated the threshold rule, and the owner of that budget's parent budget, if any.

6.17 Creating Claim Actions

Create Claim Actions to create task templates to group one or more tasks. Actions in turn are associated with reasons. When a reason is specified on a claim, the user has a choice to indicate what actions should be performed in order to move the claim to the next step. After specifying the action and updating the claim, the system will automatically populate the tasks to be performed in order to complete the action. This enables predefining the process for claims resolution.

Steps

1. Navigate to Administration > Marketing > Claim > Actions.
2. Click Create.
3. Source Object will be specified as Marketing Claim.
4. Enter a Name for the Action.
5. Enter a Start and End Date. If an End Date is not specified the Action is valid from the Start Date and does not expire.
6. Enter a Description.
7. Complete the Task Template table:

   a. Enter a Name.
   b. Enter a Description
   c. Select a Priority. Available Priorities are: Critical, Fast Track, High, Medium, Standard, Low, and Option.
   d. Enter a Duration and select a Duration Type. Available Duration Types are: Hour, Day, Week, Year, Month, and Minute.
   e. Select a Task Type, either General or Approval.
8. Click Update.

6.18 Creating Reasons

Reasons populate the Reason LOV on the Claim Details page. Each Reason has associated with it: a start and end date, a description, and a reason code, as well as one or more actions.

Steps

1. Navigate to Administration > Marketing > Reasons.
2. Click Create.
3. Enter a Reason.
4. Enter Start and End Dates. If no End Date is specified, the Reason will never expire.
5. Enter a Description.
6. Claim Reasons are mapped to Reason Codes in Oracle Receivables. The Reason Codes in Oracle Receivables could be related to Invoice or Adjustments. Hence it is required to select the type of Reason Code the Claims Reason will be mapped to.
7. Based on the Reason Type, the choices for Reason Code that will be mapped to the Claims Reason. This mapping is used to derive the Reason Code to be passed to Oracle Receivables when the Claim/Deduction is settled.
8. Each claim reason may have one or more actions to be performed. Actions are a group of tasks to be performed to resolve the claim.
9. Click Update.

Reason Codes

Invoicing Reason

A/R Error
Cancellation
Credit And Rebill
Duplicate Billing
Foreign
Free Product
Late Payment
Order Entry Error
Return
Sales Tax Error
Shipping And Handling
Wrong Freight
Wrong Tax Rate

Adjustment Reason

Charges
Discount
Endorsement
Exchange
Int Adjust
Offset
Refund
Service Termination
Small Amt Remaining
Tax
W/O Tax
Write Off

6.19 Creating Claim Types

Claims Types populate the Claim Type LOV found in the Claim Details page. Each claim type has associated with it particular GL accounts, and a start and end date.

Steps

1. Navigate to Administration > Marketing > Claim Type.
2. Click Create.
3. Enter a Name for the Claim Type.

4. Enter a Description.
5. Select a Creation Sign, either Positive or Negative.
6. Enter Start and End Dates.
7. Specify the following accounts:
   - Vendor Clearing Account.
   - Receivables Clearing Account.
8. Select a Transaction Type from the available list by clicking Go. A Transaction Type is required for AR Settlement, when claim payment method is Credit Memo, Debit Memo, Invoice Credit or Chargeback.
9. Click Update.

6.20 Creating Claim System Parameters

The Claims Systems Parameters determine how the system will operate and respond.

The Claims System Parameters screen is divided into four sections: General, Accounting, Claim, and Autopay.

Steps

1. Select a set of books. Only one set of books is allowed for one organization.
2. Select an accounting method. Only one accounting method, accrual, is supported in Release 6.

> **Note:** The Accounting section will be displayed only if the system profile AMS: Show GL Accounts On Screen is set to yes.

3. Select GL Accounting if General Ledger account should be run.
4. Select Post to GL if the Interface API should check for posting to GL.
5. Select Rounding if rounding should occur in GL.
6. Select a GL Date Type. This sets the Claim GL_DATE to one of the following:
   - Claim Date
   - Due Date

- System Date

7. Select account numbers for the following:

   - Sales/Expense/Charge Account
   - Accrual Liability Account
   - Receivable Clearing Account
   - Vendor Clearing Account

   These accounts will be used by default for posting, if the account is not defined at the Category or Budget level. The Sales/Expense/Charge Account and the Accrual Liability Account are account flexfields. When a posting is made to one of these two accounts, the numeric identifier for each component of the flexfield is obtained, through a workflow process, and the account number is created. If an account with that number does not already exist, it is created.

8. Select a default Reason for a claim. Claims which are not manually created will receive the default Reason.

9. Select a Claim Type. Claims which are not manually created will receive the default Claim Type.

10. If the Days Due item is missing in the customer trade profile, this parameter will be used. The Claim due date will default to this future date.

11. Select an Exchange Type. If a claim is not created manually and the claim currency is other than the functional currency, this exchange type will be used.

12. Select a Default Owner for claims which are not entered manually (deductions, Autopay claims). If the Assignment Manager option is selected, the owner selected here will be omitted. The Default Owner will be taken if Territory Manager is not implemented or if it does not return a suggested default owner for the claim.

13. Select Assignment Manager Implemented to automatically assign a claim. If select, the claim owner will be defaulted to the winning resource derived from the claims territory implementation.

14. Select a Receivable Batch Source. The batch source is used to create transactions in Oracle Receivables that are used to settle claims.

15. Select a Debit Memo to be used for settlement of claims. The debit memo is used to create a debit memo in Oracle Receivables to settle a claim.

16. Select a Credit Memo to be used for settlement of claims. The credit memo is used to create a credit memo in Oracle Receivables to settle a claim.

> **Note:** Oracle Receivables will be automatically reconfigured for Claims integration when information is supplied to one or both of the Debit Memo or Credit Memo fields.

17. Select a Payables Source to be used for settlement of claims. Invoices created in payables will have the invoice source. This is used for running the Payables Open Interface Import program.
18. Select a Payables Payment Term to be used for settlement of claims. If a value is set, check payments made from claims will have this payment term.
19. Select the Autopay checkbox to run the Autopay feature. Determines if Autopay will be in effect for the selected vendor.
20. Select a default Reason for the Autopay claim record. This claim reason will be used for automatic payments of accruals and earnings.
21. Select a default Claim Type for the Autopay claim record. This claim type will be used for automatic payments of accruals and earnings.
22. Enter a number for the Frequency. This is the number of Frequency Units between Autopay runs.
23. Select a Frequency Unit from the following: Days, Months, Quarters, Weeks, or Years.
24. Click Update.

6.21 Creating Trade Profile Item for Account and Organization

Use these steps to add the Trade Profile item to the Side Navigation Menu for Account and Organization.

Steps

1. Log in under the Sales Online Super User responsibility.
2. Navigate to Administration > Sales > Menu Administration.
3. Select Organization from the Menu Name drop-down menu.
4. Enter a value in the Sequence column to place the Trade Profile Item in the Side Navigation Menu list. A value of 110 is recommended.
5. Enter a value of TRADE in the Attribute column.

6. Enter Trade Profile in the Attribute Text column.
7. Selection a Function Name of AMS_ORGZN_TRADE from the list of values.
8. Click OK.
9. Select Organization from the Menu Name drop-down menu.
10. Enter a Sequence value to place the Trade Profile Item in the Side Navigation Menu list. A value of 110 is recommended.
11. Enter an Attribute of TRADE.
12. Enter Attribute Text of Trade Profile.
13. Selection a Function Name of AMS_ORGZN_TRADE from the list of values.
14. Click OK.

7 User Setup

7.1 User Creation

Users of the Oracle Marketing Online application are created using the following steps.

Note: You must perform these steps in this order shown.

Steps

Step	Required	Description
1. Create an Employee	Yes	
2. Create a User	Yes	Creates the user with the necessary responsibilities. Users are then matched to employees.
3. Set Profile Options	Yes	Set Profile Options for the User.
4. Import Employees	Yes	Import employees into Resource Manager.
5. Specify Roles and Groups	Yes	Some roles are required for access to tabs.
6. Run Concurrent Manager Program	Yes	Updates denormalized tables with group information. Must be run after users are created to put them into Groups.

1. Create an Employee.
   a. Log into forms.
   b. Select appropriate HRMS Manager Responsibility.

c. Navigate to People > Enter & Maintain.

d. In the Find Person box, select New.

e. Enter the following information:

- Last Name and First Name
- Title (courtesy title: Mr., Ms.)
- Gender (will populate based on title, if possible)
- Type = Employee
- Social Security # (will be checked against existing SS#)
- Birth Date

f. Save your work. A confirmation will appear in the lower left corner of the window.

g. Click Assignment and enter the following:

- Organization
- Team/Group
- Location
- Supervisor

h. If a dialog with Update and Correction buttons displays, select Correction to revise existing data and Update to create a new record.

i. Save your work. A confirmation will appear in the lower left corner of the window.

j. Select yes to use the new location

2. Creating a User.

a. Log into Forms under the SysAdmin login.

b. Navigate to Security > User > Define.

c. Create a new user.

d. Assign the employee created in Step 1 to the user.

e. Assign appropriate responsibilities to the user.

3. Set Profile Options:

a. Navigate to Profile > System.

b. Enter user name just created.

c. Search for profile JTF_PRO%.

d. Set JTF_PROFILE_DEFAULT_APPLICATION = 530 in the User column.

e. Set JTF_PROFILE_DEFAULT_RESPONSIBILITY in the User column, using the appropriate responsibility ID code.

f. Save your work.

4. Import Employees:

   a. Change responsibility to CRM Administrator.

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

   c. Locate the employee just created. Enter employee’s name in the name fields and click Search.

   d. Click Create Resource.

   e. Click OK to accept default values.

   f. Click Save Resource (record the transaction number).

   g. Click Details.

5. Specify Roles and Groups.

   See Defining Marketing Groups, below.

   a. Navigate to Resource Manager.

   b. Select the employee as the resource.

   c. Click Details.

   d. On the Roles tab:

      - If the user is to have access to the Audience and/or Administration tabs, add a role type of Sales and a Role of Sales Representative.
      - If the organization is implementing One to One Fulfillment, users: (a) must have JTF_FM_ADMIN role assigned to them, and (b) be assigned to the Fulfillment Resource Group.
      - If the user is the default approver for marketing objects, add a Role of Default Marketing Approver.

Note: Only one user may be assigned the role of Default Marketing Approver.

- If the user is an approver for marketing objects, add a Role of Marketing Approver. Note that multiple assignments of this Role are permissible.

Note: The Role you assign to an employee in Resource Manager has no relationship to the Role you assign the employee as a member of a group.

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e. On the Group tab, select a group with Usages of Sales and TeleSales and Oracle Marketing.

f. Make sure that the Group Member Role Sales Representative is associated to the above group on the resource details screen.

6. Run Concurrent Manager Program.

   When finished entering users, run the Concurrent Manager Program, AMS Group Access Refresh. (See Set Up and Run Concurrent Manager Programs.)

7.1.1 Defining Marketing Groups

Steps

1. Under the CRM Administrator responsibility, navigate to Resource Manager > Maintain Resources > Groups.

   The Define Groups window appears.

Tip: To create a hierarchy of groups, start at the bottom or the top of the hierarchy. This will make it easier to link each group either to the parent group or to its child groups.

---

2. For each group in the hierarchy:

   a. Enter the group name.

Note: If the window is not blank you can create a new record by clicking New on the toolbar.

---

b. Enter an optional description.

c. On the Parent Groups tab, enter the group, if any, that is above the current group in the group hierarchy.

Note: You need not enter both parent and child groups. If you build your hierarchy by entering parent groups, then you need not enter child groups and vice versa. The missing groups are supplied by the application automatically.

---

d. On the Child Groups tab, enter the groups that are below the current group in the group hierarchy.

e. On the Usages tab, use the LOV to enter `Oracle Marketing`. You must make this entry for the group to be recognized by Oracle Marketing Online. In addition, if this group requires access to the Audience and/or Administration tabs, add Usages of Sales and TeleSales and Oracle Marketing.

f. Click Save on the toolbar.

Reference

For more information on using Resource Manager see *Oracle CRM Foundation Components Concepts and Procedures, Release 11i*, Using Resource Manager, Defining Resource Groups.

7.2 Optional Employee Setups

The following may be set through Forms, System Profiles or may be set by the user using the Profile icon in the application.

The following may be set by the user by navigating to Profile > Marketing Online > General.

Option	Required	Level	Setting	Effect/Limitation
AMS: Enable Tip Text	Optional	User	Yes/No	Tip text will be displayed in the UI.
AMS Profile Search Set Size	Yes	User	Numeric	Indicates the number of rows displayed in selection windows.
AMS User Country	Optional	User	Select from countries created in the Administration tab.	Defaults new objects to this country when created.
AMS User Timezone	Optional	User	Select the timezone the user is in.	All activities scheduled by the user will be converted to and be executed at the system timezone.

7.3 User Security

Use

While the extent to which security is set will depend on the business process of the client, Oracle Marketing Online provides the flexibility to create security and access privileges at many different levels throughout the application, such as tab, subtab, side navigation bar, and items on the Side Navigation Menu.

The following are the common areas where security may be implemented:

Levels

1. **Menus.** This can be set to limit a user's access to specific tabs and subtabs. For example, business process may require that only a few key individual users have access to the administration tab. Or, that a security structure should exist whereby a user should have access to a specific tab, like Deliverables, but only access to one of the two subtabs.

2. **Functions**. Whereas menus can be set to the limit access to tabs and subtabs, functions can be set to limit a user's access within a tab/subtab. For example, a function could be set to limit the user's access to the side navigation bar and one of the component groups such as Collaboration and one of its cue cards. Another use is the ability to limit what tasks the user may be able to perform. For example, a function could be set to limit the ability of user to create objects by removing the functionality associated with the create button.

A common scenario may be where a security structure is set to use a combination of both functionalities; Menus and Functions. Consider the following: two responsibilities, X & Y, are created where responsibility X is meant to have access to budget tab and budget cue card and Y is not. As mentioned above, for responsibility Y, the menu and function, corresponding to the budget tab and cue card respectively, can be excluded.

Note: Menus and functions can be included or excluded when creating a responsibility through System Administrator Responsibility in Forms (Applications > Functions > Security > Responsibility > Define).

In addition to menus and functions, additional types of security can be made through:

- AMS: Admin Group. This is a system profile, that when set, allows the resources that are part of this identified group to have full access to marketing objects regardless of whether or not they are associated to the specified object.
- Groups/Teams/Users can be given access to a marketing object via the Team item on the Side Navigation Menu under the Collaboration component group.
- Edit Metrics. When checked against a group/team/user, grants access to Budget, under the Planning component group, Cost and Revenues, under the Planning component group, and Metrics, under the Tracking component group, for the specified group/team/user.

7.4 Security for Sales Online Pages

Oracle Marketing Online uses pages from Oracle Sales Online on its Audience tab. In order to implement security for these pages, please refer to the Setting up Users, Security and Reporting Hierarchy, Setting up System Profile Options, Functional Area section of the Oracle Sales Online, Telesales and Field Sales Implementation Guide, for more information on the Access profile options.

These System Profile Options will determine what information is displayed on the Organization and Person subtabs in the Audience tab of Oracle Marketing Online.

8

Post Implementation Steps

8.1 Setting up One to One Fulfillment

Required for campaigns utilizing email or fax execution.

8.2 Setting up Marketing Encyclopedia

Required for Encyclopedia subtab on the Home tab.

For more information about Marketing Encyclopedia, see *Oracle Marketing Encyclopedia Concepts and Procedures.*

8.3 Setting up Oracle Partners Online

Required for partner interactions.

Refer to the *Oracle Partner Relationship Management Implementation Guide* for information about setting up Partners.

8.4 Setting Up Scripting

Required for campaigns using telemarketing execution.

Follow the instructions in the *Oracle Scripting Implementation Guide* and *Oracle Scripting Concepts and Procedures Guide* to set up scripts.

8.5 Setting Up CRM Foundation Territory Manager

Useful, but not required, for implementing Trade Management.

Refer to the Implementing Territory Manager section of the *Oracle CRM Foundation Implementation Guide* for information about setting up territory management.

After the territory administrator has completed the territory setups as outlined in the CRM Foundation Implementation Guide and has run the "Generate Territory Package" and "Territory Denormalization Refresh", then run "Assign Territory Access". See Running Concurrent Manager Programs.

8.6 Setting Up Call Center / Advanced Outbound

Required for campaigns using telemarketing execution.

Follow the instructions in the implementation section of *Oracle Predictive Concepts and Procedures* and *Oracle Telephony Manager Implementation Guide*.

8.7 Setting up Interaction History

Optional. Tracks customer interactions with the organization.

Refer to the Implementing Interaction History section of the *Oracle CRM Foundation Implementation Guide* for information on setting up Interaction History.

8.8 Setting Up Descriptive Flexfields

Please refer to the *Oracle Applications Flexfield Guide* for detailed information about setting up descriptive flexfields.

8.9 Setting up Default Budgets

Option	Required	Level	Setting	Effect/Limitation
AMS: Default Budget for a Person	Yes	User	All Budgets which are owned by the user.	
AMS: Default Partner Budget	Yes	User	User Determined	

8.10 Checking Post Installation Steps

Check for the following post installation steps on the Applications Database necessary for the Gateway.

- Check for Advanced Queues
- Verify the Unique Global Name
- Modify Oracle Applications Database Parameters
- Run snapshot log creation scripts
- Verify System Profile Option Values

A

Acronyms

This appendix provides a list of acronyms used throughout this Guide. For additional information please see the Glossary in Appendix B.

AMS	Prefix associated with Oracle Marketing Online.
AO	Oracle Advanced Outbound. A product used to preprocess marketing campaigns for Oracle Telesales.
AP	Accounts Payable.
AR	Accounts Receivables.
B2B	Business to Business, a commerce model.
B2B2C	Business to Business to Consumer, a commerce model usually associated with Trade Management.
B2C	Business to Consumer, a commerce model.
COGS	Cost of Goods Sold.
CRM	Customer Relationship Management.
CSV	A comma delimited data file type.
DBA	Database Administrator. The person within an organization primarily responsible for the deployment and maintenance of an Oracle database product.
DNC	Do Not Call. A flag in marketing databases and lists indicating people who do not wish to be contacted.
ERP	Enterprise Resource Planning.

EUL	The End User Layer is a user interface that is part of Oracle Discoverer. The EUL provides a methodology for questioning a database without having to know query language, or database terminology or structure.
GL	General Ledger.
GRE	Government Reporting Entity
GUI	Graphical User Interface.
HTML	HyperText Markup Language.
HR	Human Resources.
HRMS	Human Resources Management System.
ICX	A Prefix associated with Oracle Discoverer.
JRE	Java Runtime Environment.
JSP	Java Server Page.
JTF	CRM Foundation modules.
LOV	The List of Values is a list that appears in various drop-down fields within OMO. These List of Values can be predefined or created from user entered information.
MES	Marketing Encyclopedia System.
ODM	Oracle Data Mining.
OIC	Oracle Incentive Compensation.
OMO	Oracle Marketing Online.
OSO	Oracle Sales Online.
OTS	Oracle TeleSales.
PHP	Personal Home Page where Workflow notifications may be found.
PIN	Personal Identification Number.
QP	Prefix associated with Oracle Advanced Pricing.
ROI	Return on Investment.
SIC	Standard Industry Code.
SQL	Structured Query Language. Used to query databases.

TCA	Trading Community Architecture. Oracle's single customer database architecture for all types of customers.
TM	Trade Management.
UI	User Interface.
UOM	Unit of Measure.
URL	Universal Resource Locator is the full name or path of a web page or file location.

B

Glossary of Terms

This appendix provides a Glossary of Terms used throughout this guide.

Activity Type

A general category for marketing activities of similar type.

Activity

An activity associated with a Campaign Schedule, Events and other objects.

Actuals

Actual costs using with Costs and Metrics.

Analytics

A group of tools used to predict purchasing behavior by analyzing customers' response to a prior campaign.

Approval Rule

Rules used to automate and control the routing and sequence of approval requests.

Attachment

A file or URL attached to a marketing object.

Audience

The audience tab provides functionality relating to List creation, management and the creation and management of information relation to parties external to the organization.

Budget
The Budget tab provides a variety of Budget creation and management functions.

Budget Source
Term applied to the name of the budget funding a marketing object.

Budget Source Value
The amount being requested or approved from a Budget Source.

Business Rules
The rules and guidelines which govern how an organization uses the Oracle eBusiness Suite.

Business Unit
A grouping of users within the application, defining the organizational structure.

Campaign
A marketing effort comprising any number of different techniques for reaching Customers or Prospects.

Campaign Schedule
The marketing object that executes campaign activities.

Claim
A discrepancy between amount billed to a customer and the amount paid by a customer. Claims are used to track discrepancies to their basis and validate them.

Closed-Loop Marketing
The ability to plan, manage, execute and analyze marketing activities. Oracle, by virtue of its comprehensive marketing offering and integration to other Oracle applications—both CRM and ERP—is able to do this where other vendors simply are not.

Cost
A particular type of Metric used to track costs and expenses associated with Campaigns, Events and Offers.

Customer
A prior purchaser of products or services.

Deduction
A Claim that originates with Accounts Receivable. This is generally the result of a short pay by the customer.

Deduplication
To remove duplicate records from a list, the entries are compared based on the deduplication rules specified in the administration tab.

Deliverable
A unit of marketing information to be given to a Customer or Prospect. Deliverables may be in hard form, e.g., a flyer or printed information, or in soft form, e.g., an electronic brochure or email attachment.

Discoverer
Oracle Discoverer is a data mining tool allowing users to query databases without knowing SQL.

Display Priority
An attribute of the posting's content type used to prioritize the recommended content for display, based on supplied criteria.

eMerchandizing
A group of methodologies used to configure websites according to customer preferences and anticipated interests.

Event
As it relates to marketing, an Event is a marketing effort with a specific location, such as a conference, exhibit, seminar, or trade show. Events may be separate from, in addition to, or supported by Campaigns.

Event Promotion
A specific type of Campaign used for promoting an event.

Event Schedule

A marketing object that executes Event activities.

Field

A unit of data. Data is stored in an array of records and fields. A field on a Page is where data is entered or selected from a LOV.

Forecast

Used to enter forecast costs or values for metrics.

Geography

Used to define the geographical breakdown and hierarchy used by an organization.

Interaction

A touchpoint with a customer or potential customer. Interactions may be recorded in Oracle Interaction History.

Home

The Home tab is the first tab the user sees when they log onto Marketing Online. The Home tab contains a number of bins and available reports as well as links in certain bins to recently accessed marketing objects.

Import

A function on the Audience tab which allows for importation of information into TCA.

Interaction

A touchpoint between the organization and a customer or prospect. Interactions may be tracked for later qualification and rating.

*i*Store

An Oracle product designed for producing commerce websites.

Lead

A qualified prospect for the sale of products or services. A lead may result from the prospect contacting the organization or by the organization contacting the prospect.

Link

A hyperlink to another Page.

List Import Table

A database table where records imported from a rented or purchased list are stored. These records may be added to TCA from the List Import Table.

List

A static list of customers, prospects, or both, along with various related information.

Market Segment

A subdivision of an audience defined by specific parameters. See Segment.

Marketing Object

A functional unit in Oracle Marketing Online. For example, campaign, event, deliverable, list, or message.

Marketing Medium

A channel for executing marketing activities. This can be different types of media, such as radio, television or print as well as delivery methods, such as email, fax and direct mail.

Merchandising Strategy

A mechanism used to select personalized content items for display on a Web site. Merchandising strategies include strategies from Oracle Personalization, static cross-sells, specific list of content items, and others.

Message

A slogan used for marketing purposes.

Metric

A measuring device used to track Campaigns and Events. Metrics may measure responses, revenue or other statistics.

Multi Org

Used to describe the capacities of Oracle products to accommodate multiple organizations in multiple countries with differing currencies and languages.

Note
A note may be attached to almost any marketing object for many different purposes. Notes, once attached, are not deleteable.

Note Type
These are organization-defined types to used to categorize notes.

Object
See Marketing Object.

Offer
The incentive bundled with a product or service in a campaign. It may be monetary or non-monetary based. An example of a monetary offer is a 20% discount for signing up Cellular service. A non-monetary offer may be the free guide to retirement planning given with a subscription to Money magazine.

One-Off Event
A One-Off Event is a "single" event which occurs just once.

Owner
The owner of a Marketing Object.

Page
A HTML page viewed in a browser.

Performance Matrix
A report containing detailed information about a model’s ability to make accurate predictions of customer behavior.

Personalize
A function that allows a user to customize many different pages to accommodate his specific needs.

Placement
The association of a Web location (defined by a site, a page and a page location), a posting and a display style.

Posting

An object that represents the way personalized content is retrieved. Postings can be Universal, i.e., the same strategy for selecting content is applied to all the visitors, or Rule-based, i.e., different strategies apply to different situations that are described by the rules conditions.

Posting Rule

A set of conditional statements, merchandising strategy and a rule priority. The merchandising strategy is triggered if all conditional statements are true.

Product

A product or service which can be associated with a Marketing Object.

Product Family

A group of products or services which can be associated with a Marketing Object.

Profile

A profile is a set of pages where a user's information for interaction with the application is stored. For example, name, password, number rows of information displayed in a table, or size of lookup pages.

Program

A group of Campaigns and/or Events that are grouped together.

Prospects

Prospective customers who have not previously purchased products or services.

Record

A collection of related Fields. All of the fields in a Record contain data relating to a single item.

Response

Any communication received back from a customer or prospect. Responses may be saved in Oracle Interaction History.

Rollup Cost

A cost metric that is composed of other cost metrics.

Rollup Metric

A metric that is composed of other metrics.

Schedule

Execution vehicle of a campaign or event within Oracle Marketing Online. For example, a campaign may have an email schedule, and telemarketing schedule and direct mail schedule which roll up to the campaign; an event may have a briefing, web seminar, or conference that roll up to it.

Segment

A set of criteria used to extract a list of Customers or Prospects or both from a database.

Source Code

A code associated with various marketing objects in OMO. Source codes are utilized by many interrelated products for relating Interactions, purchases and responses back to the Campaign or Event that generated them.

Status

Statuses are assigned to various marketing objects to let users and the system know the state of the object. Changes in status may be affected by the user or may be affected by the system, particularly those status changes requiring approval.

Structured Query Language (SQL)

Sometimes pronounced "Sequel", Structured Query Language is a standard for querying, or asking questions of, a database.

Subtab

Some tabs have further divisions called subtabs. Subtabs, if any, are displayed horizontally underneath the tabs.

Summary Page

Summary pages, which are a list of marketing objects, appear under many tabs and subtabs. To view a marketing object's details, click the object's name.

Tab

Main divisions within the user interface of Oracle Marketing Online.

TCA or Trading Community Architecture

Oracle's single customer database architecture for all types of customers.

Trade Management

Marketing functionality used to track the Business to Business to Consumer relationship.

Venue

A location for an Event.

View

A listing of Marketing Objects generally displayed on the Summary Page of a tab.

Workbook

A collection of one or more Worksheets generated by Oracle Discoverer.

Workflow

Oracle Workflow is a foundation product using to track and relay approvals and notifications according to Business Rules.

Worksheet

A spreadsheet of Customers or Prospects, or both, extracted from a database by Oracle Discoverer.

C

Summary of System Profile Options

This appendix provides a table of the system profile options used by Oracle Marketing Online.

Option	Required	Level	Setting	Effect/Limitation
AMS Admin Group	Yes	Site	Select from any group defined in JTF Resource Groups	Resources that are part of this group will have full access to all campaigns, events, and other marketing objects. Note that this should be a single level group.
AMS: Allow committed budget to exceed total budget	Optional	All	Yes/No	When set to Yes, the committed amount for the budget may exceed its total budget amount.
AMS: Allow Inventory Item Update	Yes	User	Yes/No	Indicates whether user from OMO application is allowed to update inventory item. Note This profile is updatable only by the system administrator though it is a user level profile.
AMS: Allow Recalcula-tion of Committed Budget	Optional	All	Yes/No	When set to Yes will perform recalculation of commitment of offers.
AMS: Allow Updates to QP Price Lists in OMO	Yes	Respon sibility	Yes/No	Selecting Yes will allow Price lists created using Advanced Pricing can be edited in Oracle Marketing Online.

Option	Required	Level	Setting	Effect/Limitation
AMS: Auto Register for Events upon cancellation	Yes	Site	Yes/No	This is used to determine if the attendee can be moved from the waiting list to registered status if a spot is available
AMS Call Center Enabled				Not valid for release 6.
AMS Campaign Display Version				Not valid for release 6.
AMS: Choose Date Qualifier Regions	Yes	Site	Show All Show Header Dates Show only Date Qualifiers	This profile is used in the Trade Deal Offer User Interface. Based on the setting, the user may either enter date qualifiers or Header Dates or both.
AMS: Copy Event Details to Event Schedules	Yes	Site	Yes/No	This is used to allow details of parent Event to be copied to the schedule
AMS Currency Conversion	Yes	Site	Select from conversions defined in GL, such as Corporate or Spot.	This is the exchange rate used for converting transactional amounts into the default currency.
AMS: Custom Condition Class	Optional	Site	Java class name of the custom condition	This class is invoked in the runtime when custom conditions are implemented.
AMS Data Entry Rows				Not valid for release 6.
AMS Data Mining DB Link	Yes	Site	All database links in the database.	The scoring run result processing program will use the db link to fetch results.
AMS: Data Mining Engine Output Schema	Yes	Site	Free form text corresponding to the scoring output schema specified in Step 3.	The scoring run result processing program will use the scheme specified to fetch the results.

Option	Required	Level	Setting	Effect/Limitation
AMS: Data Mining Engine Program Property File	Yes	Site	Free form text corresponding to the location of the property file created in Step 1.	The Java Concurrent Program will use the property file indicated in the profile option value to invoke program settings by calling ODM 9i API's.
AMS Date Format				Not valid for release 6.
AMS Default Bucket for discount rules	Yes	Site	Values from Advanced Pricing Lookup PRICING_ GROUP_ SEQUENCE	The value set here will be used as the default value for buckets in the discount rules.
AMS Default Budget for a Person	Yes	User	All Budgets which are owned by the user.	
AMS Default Campaign Custom Setup Type for Fully Accrued Budgets				Not valid for release 6.
AMS Default Currency Code	Yes	Site	Select from currencies defined in FND_ CURRENCIES	This becomes the default functional currency. All transactions will be converted and stored in this currency. This will be the default currency for Currency LOV.
AMS Default Home Page				Not valid for release 6.
AMS: Default Offer Formula	Optional	Site	Available pricing formulas in Advanced Pricing	This option handles discount rules for product categories when the Unit of Measure is not specified.
AMS: Default Offer Stylesheet	Yes	Site	User defined	Not valid for release 6.

Option	Required	Level	Setting	Effect/Limitation
AMS Default Owner Assigned to Claim				Not valid for release 6.
AMS: Default Period in Days for recalculating committed budget	Optional	All	Number of Days	The number of days between performing committed budget calculations.
AMS: Default Phase for Line level discounts	Yes	Site	Available values are derived from event phase setup in Advanced Pricing	This value will be used as the default value for phase for all discount rules with a discount level of Line.
AMS: Default Phase for Line Group level discounts	Yes	Site	Available values are derived from event phase setup in Advanced Pricing	This value will be used as the default value for phase for all discount rules with a discount level of Group of Lines.
AMS: Default Phase for Order level discounts	Yes	Site	Available values are derived from event phase setup in Advanced Pricing	This value will be used as the default value for phase for all discount rules with a discount level of Order.
AMS: Default Product Stylesheet	Yes	Site	User defined	Determines the default stylesheet file for Products.
AMS: Default Schedule Stylesheet	Yes	Site	User Defined	Determines the default stylesheet file for Schedules.
AMS Default Task Rule				Not valid for release 6.
AMS Default Task Status	Optional	Site	Depends on JTF Task Statuses	If nothing is entered here, tasks will default to 'unassigned'.

Option	Required	Level	Setting	Effect/Limitation
AMS Default Team for User				Not valid for release 6.
AMS Default Time Out Used for Tasks				Not valid for release 6.
AMS Default Transaction (Receivables) Batch Source				Not valid for release 6.
AMS: Default value for Print on Invoice Flag	Yes	Site	Yes/No	Used as a default for all discount rules.
AMS: Default value for Product Preference	Yes	Site	User Defined	Used as a default for all discount rules.
AMS : Email Footer Banner	Optional	User	Image File and Path	Image for the email footer of an email blast.
AMS : Email Header Banner	Optional	User	Image File and Path	Image for the email header of an email blast.
AMS: Enable Tip Text	Optional	User	Yes/No	Tip text will be displayed in the UI.
AMS: Grace Period in Days	Yes	User	User/Org determined number of days	When automatic reconciliation of budgets is performed, this grace period is checked. If the marketing object is older than the ending date plus the grace period, any remaining funds associated with the marketing object are returned to the budgets they were drawn from. This also sets the number of days after the completion of a campaign for the concurrent manager to delete the target group entries from the AMS_ LIST_ENTRIES table default is 30 days.
AMS HZ Dedupe Rule	Optional	Site	Yes/No	Indicates whether deduplication rules are in effect for records placed into TCA.

Option	Required	Level	Setting	Effect/Limitation
AMS Implement Assignment Manager for Claims				Not valid for release 6.
AMS: Implement Contra Charge	Yes	Site	Yes/No	If set to Yes, “Contra Charge” is a settlement option available when settling claims. Contra charges are used to track offsetting balances for creditors who are also debtors.
AMS: Implement Payables	Yes	Site	Yes/No	If get to Yes, “Check” is a settlement option available when settling claims.
AMS Import Control File Path	Yes	Site	Control File Location	Path for the bin directory ($AMS_ TOP/bin) Improper setup will cause the server side import to fail.
AMS Import Date File Path	Yes	Site	Data File Location	Path for the data file location Improper setup will cause the server side import to fail.
AMS: Item Validation Master Organization	Yes	Site	A Valid Master Inventory Organization	When a deliverable is flagged as an inventory item, it is created in Inventory under the specified master organization.
AMS Item Validation Organization	Yes	Site	User Defined	Determines whether the Organization ID is used for items.
AMS: List Workbook B2B Marketing	Optional	Site	User Defined	Workbook name convention prefix for B2B workbooks. The default is B2B. No convention prefix will result in more workbooks than you need in the LOV.
AMS: List Workbook B2C Marketing	Optional	Site	User Defined	Workbook name convention prefix for B2C workbooks. The default is B2C. No convention prefix will result in more workbooks than you need in the LOV.

Option	Required	Level	Setting	Effect/Limitation
AMS Lowest Importance Level for Task Notifications				Not valid for release 6.
AMS Marketing Calendar	Yes	Site	Calendar entered in section 4.1.2	Where the calendar created in 4.1.2 is linked to the application.
AMS: Marketing to ODM Database Link	Yes	Site	All database links in the database.	The scoring run result processing program will use the db link to fetch results.
AMS: Merchant Party ID	Yes	Site	Choose from a list of Parties provided	This value determines the party ID of the current active merchant.
AMS News Items per Company				Not valid for release 6.
AMS Number of items in Bin				Not valid for release 6.
AMS Numeric Format				Not valid for release 6.
AMS: OA Media	Optional	Site	Physical file path of media directory where the image files are stored.	This is used in the upgrade process to read the files from the media directory and store them in the database.
AMS: Oracle Personalization Enabled	Optional	Site	Yes/No	This enables the use of Oracle Personalization. Before enabling this option, Oracle Personalization must already be implemented.
AMS: Posting Runtime Shopping Cart Currency	Yes	Site	Select from a list of values. USD is the default.	Determines the currency in which shopping cart amounts are measured.
AMS: Prefix to Registration Confirmation Code	Optional	Site	User Defined	Characters for the Event Registration Confirmation Code.

Option	Required	Level	Setting	Effect/Limitation
AMS Pricelist Header Name for Events	Yes	Site	User defined entry	Enter the name of the default price list for events
AMS Profile Search Set Size	Yes	User	Numeric	Indicates the number of rows displayed in selection windows.
AMS: Relationship Type for Buying Group	Yes	Site	Any valid relationship type created in TCA	Used to establish a hierarchical group of customers in TCA. For example, if value is set to subsidiaries then all parties who share this relationship will be part of a buying group. These are used as qualification criteria for offers.
AMS Root Section for Price List Report	Yes	Site	Sections defined in the hierarchy Tab of iStore's Merchange UI	Price list report available from the overview page will utilize the section set in this profile to determine the section hierarchy. Items can be grouped into sections. Sections in turn can be grouped into other sections, creating a hierarchical structure.
AMS: Server URL	Yes	Site	User Defined	This value determines the runtime URL path of the server. Used to generate API details for affiliates during placement definition.
AMS: Should Call to Inventory Modules be Made				Obsolete as of Release 7.
AMS: Should call to Pricing Modules be Made				Obsolete as of Release 7.
AMS: Show GL Accounts On Screen	Yes	User	Yes/No	Default is Yes. If Yes is selected the Sales/ Expense Account field and the Accrual Liability Account field appear in the Create Budget page.
AMS Source Code Date Format	Yes	Site	Any valid date format	Used in the generation of source codes.

Option	Required	Level	Setting	Effect/Limitation
AMS Source Code Sequence Length	Yes	Site	Maximum field length is 30.	Source Code includes Geography code, Month code, Activity code, Source code digits and Suffix. See Source Codes in Appendix L.
AMS: Source from Parent Object	Yes	Site	Yes/No	Determines whether campaign schedules and event schedules are sourced from their parent campaigns and events (Yes) or from budgets (No). Campaigns and Events, themselves, may only be sourced from budgets.
AMS Stock Symbols				Not valid for release 6.
AMS System Timezone	Yes	Site	Select the timezone the central server is in.	Timezones are defined in HZ_ TIMEZONES.
AMS Threshold Percentage	Yes	Site	Enter a value between 0 and 100	For a marketing object with an Initial Estimated Amount (IEA) value entered into the Budget page for that object to go to Active status, it must obtain budget approval for this percentage of the IEA. During the initial stage, before the object status is Active, requests in excess of the IEA are not allowed.
AMS Time Format				Not valid for release 6.
AMS: UOM Area	Yes	Site	Depends on UOM Setup	If not set correctly, will not be displayed for fields that use UOM (for example, area in square feet).
AMS: UOM Length	Yes	Site	Depends on UOM Setup	If not set correctly, will not be displayed for fields that use UOM (for example, length in feet).
AMS: UOM Quantity	Yes	Site	Depends on UOM Setup	If not set correctly, will not be displayed for fields that use UOM (for example, units in each).
AMS: UOM Time	Yes	Site	Depends on UOM Setup	If not set correctly, will not be displayed for fields that use UOM (for example, time in minutes).

Option	Required	Level	Setting	Effect/Limitation
AMS Upgrade Complete	Optional	Site	Yes/No	Yes means no upgrade and No means will upgrade data.
AMS: Upgrade iMarketing	N	Site	Yes/No	Used to determine whether to upgrade iMarketing data from the previous version.
AMS User Country	Yes	User	Select from valid countries	Defaults new objects to this country when created.
AMS User Timezone	Optional	User	Select the timezone the user is in.	All activities scheduled by the user will be converted to and be executed at the system timezone.
AMS: Validation	Optional	User	0-100	This profile option affects the validation severity at the database level. A value of 100 (Maximum value of 100) would cause the APIs to validate the passed data very stringently.
HZ: Address Key Length	Optional	Site	Length of the Address	This determines the length of Address key.
HZ: Key Word Count	Optional	Site	Number of words	This number determines how many words in the customer name are used to generate the keys.
HZ: Postal Code Key Length	Optional	Site	Length of the Postal Code	This determines the length of Postal Code key.
IBE: Use Web Placements	Yes	Appli cation	Yes/No	Determines whether placements are displayed. Required only when implementing *i*Store.
ICX: Discoverer End User Layer	Yes	Site	User Defined	EUL prefix for Discoverer, Usually EUL4
ICX: Discoverer Launcher	Yes	Site	User Defined	URL to launch Discoverer Web version
ICX: Discoverer Use Viewer	Optional	Site	Yes/No	Whether to use viewer instead Web Discoverer. Defaulted to No.
ICX: Discoverer Viewer Launcher	Yes	Site	User Defined	URL to launch Discoverer viewer

Option	Required	Level	Setting	Effect/Limitation
JTF Home Page File Name	Optional	Site or Appli cation	User Defined.	Enter a file name of the jsp file (for example, jtfhomepage.jsp). If no value is supplied, a generic information page is displayed. If a file is supplied it will be displayed on the home page.
OSO: Minimum search string length	Optional	Site or User	User Defined	The default setting is 0. This profile determines the number of characters that must be entered before performing a search.
OSO: Search Lead Wildcard	Optional	Any	Yes/No	If Yes, the wildcard (%) will be allowed as the first character in a search string. If No, and the wildcard is entered as the first character, the system will give the user an error message.
QP: Accrual UOM Class	Yes	Site	UOM Classes as set up in Inventory	Used by accrual offers. All accrual units will fall under this UOM class. For example, frequent flyer miles.
QP: Item Validation Organization	Yes	Respon sibility	Select from Inventory Organizations as set up in Inventory	Offers can be defined only for those products which will be available in the specified organization. Required for all offers. Prices may be defined only for those products which will be available in the specified organization.
QP: Source System Code	Yes	Respon sibility	Possible Source Systems that can define offers	Offers created using this relationship are tagged with this system source code and will be used to determine update privileges of offers within the pricing module.
Task Manager: Default assignee status	Optional	Appli cation	User Defined	Specifies the default assignee status when creating or assigning a task.
Task Manager: Default Priority	Optional	Appli cation	User Defined	Specifies the default task priority when creating a task.
Task Manager: Default Task Status	Optional	Appli cation	User Defined	Required for implementing a task transition rule. This profile option must be set to the initial status of the rule.

Option	Required	Level	Setting	Effect/Limitation
Task Manager: Owner type for a task	Optional	Appli cation	User Defined	Specifies the default task type when creating a task.

D

Summary of Lookup Settings

This appendix provides a table of Lookup settings used by Oracle Marketing Online.

Key	Type	Values	Meanings
AGGREGATE_BY	System	YEAR MONTH QTR INCREMENT	Year Month Quarter Increment
AMS_ ACCESS_ TYPE	System	Group User	Group User
AMS_ ACCRUAL_ BASIS	System	Customer Sales	Customer Sales
AMS_ ADJUSTMENT_ TYPE	Extensible	Decrease_ Committed Decrease_ Comm_ Earned Decrease_ Earned Standard	Decrease Committed Amount Decrease Committed and Earned Amounts Decrease Earned Amount Increase Earned Amount
AMS_ BUDGET_ SOURCE_ STATUS	System	Approved Closed New Pending Rejected	Approved Closed Planning Pending Rejected

Key	Type	Values	Meanings
AMS_ BUDGET_ TRANS_ TYPE	User	Credit Debit	Credit Debit
AMS_CAMP_FULFILL_ON	System	On_Invite	On Invite
AMS_CAMP_ RELATED_ EVENT	System	EONE EVEH EVEO	One-Off Event Event Event Schedule
AMS_ CAMPAIGN_ PURPOSE	Extensible	Awareness Lead Lead_ Maturation Sales_ Readiness	Awareness Lead Generation (?) Lead Maturation Sales Readiness
AMS_ CAMPAIGN_ SCHEDULE_STATUS	System	Active Archived Available Cancelled Closed Completed Denied_BA New On_Hold Submitted_ BA	Active Archived Available Cancelled Closed Completed Denied Budget Approval New Active, but locked Pending Budget Approval

Key	Type	Values	Meanings
AMS_ CAMPAIGN_ STATUS	System	Active	Active
		Archived	Archived
		Available	Available
		Cancelled	Cancelled
		Closed	Closed
		Completed	Completed
		Denied_BA	Denied Budget Approval
		Denied_TA	Denied Theme Approval
		New	New
		On_Hold	Active, but locked
		Planning	Planned
		Submitted_Budget Approval	Submitted for Budget Approval
		Submitted_Theme Approval	Submitted for Theme Approval
AMS_CLAIM_ CLASS	System	Claim	Claim
		Deduction	Deduction
AMS_CLAIM_ HISTORY_ EVENT	System	Changes	Changes
		Line	Line
		New	New
		Split	Split
AMS_CLAIM_ PAYMENT_ METHOD	System	Check	Check
		Credit_Memo	Credit Memo
		Debit_Memo	Debit Memo

Key	Type	Values	Meanings
AMS_CLAIM_STATUS	System	Approved Cancelled Closed Complete Duplicate New Open Pending Pending_Approval Pending_Close Rejected	Approved Cancelled Closed Complete Duplicate New Open Pending Pending Approval Pending Close Rejected
AMS_ CONTACT_ POINT_ TYPE	Extensible	Address Email Fax Inbound_ script Outbound_ script Phone Website	Address Email Fax Inbound Script Outbound Script Phone Website
AMS_ CONTACT_ POINT_ TYPE	Extensible	Address Email Fax Inbound_ script Outbound_ script Phone Website	Address Email Fax In bound Script Outbound Script Phone Website
AMS_ CONTENT_ TYPE	Extensible	HTML Text	HTML Text Used for email schedules
AMS_ CREATION_ SIGN	System	+ -	Positive Negative

Key	Type	Values	Meanings
AMS_ DEDUCTION_ PAYMENT_ METHOD	System	Adjustment	Adjustment
		Chargeback	Chargeback
		Contra_Charge	Contra Charge
		Credit_Memo	On Account Credit
		Debit_Memo	Debit Memo
		Reg_Credit_Memo	Invoice Credit
		Write_Off	Write Off
AMS_DELIV_STATUS	User	Archived	Archived
		Available	Available
		Cancelled	Cancelled
		Denied_BA	Denied - Budget Approval
		New	New
		Submitted_BA	Submitted - Budget Approval
		Superceded	Superceded
		Expired	Expired
		Denied_TA	Denied - Concept Approval
		Budget_Appr	Budget Approved
		Submitted_TA	Submitted - Concept Approval
AMS_DELIVERY_MEDIA_ TYPE	Extensible	I SEMINAR	I Seminar
		ON_SITE	On Site
		SEMINAR	Seminar
		WEB	Web

Key	Type	Values	Meanings
AMS_DM_ MODEL_ STATUS	System	Available Draft Building Scheduled Scoring Archived Expired Custom Preview Queued	Available Draft Building Scheduled Scoring Archived Expired Custom Preview Queued
AMS_DM_ MODEL_ TYPE	System	Email Telemarketing DirectMail Loyalty Custom	Email Response Telemarketing Response Direct Mail Response Loyalty Custom
AMS_DM_ SCORE_ STATUS	System	Draft Scheduled Scoring Completed Archived Preview Queued	Draft Scheduled Scoring Completed Archived Preview Queued
AMS_DM_ SOURCE_ TYPE	System	Standard Cell CSCH DIWB	Generated List Segment Campaign Schedule Discoverer Workbook
AMS_DM_ TARGET_ GROUP_ TYPE	System	Business Consumer	Organization Contacts Persons
AMS_DM_ TARGET_ VALUE_ TYPE	System	Binary Categorical Continuous	Binary Categorical Continuous

Key	Type	Values	Meanings
AMS_EVENT_AGENDA_ STATUS	System	Confirmed Unconfirmed	Confirmed Unconfirmed
AMS_EVENT_ ATTENDANCE_FAILURE	System	Agenda_Change Disaster Personal_Emergency Schedule_Conflict Speaker_Change Venue_Change Work_Emergency	Agenda Change Natural Disaster Personal Emergency Schedule Conflict Speaker Change Venue Change Work Emergency
AMS_EVENT_CANCEL_ REASON	System	Disaster Insufficient_Reg Postponed Schedule_Conflict Speaker_ Unavailable Venue_Unavailable	Natural Disaster Insufficient Registration Postponed Schedule Conflict Speaker not available Venue not availalble
AMS_EVENT_CERT_ CREDIT_ TYPE	System	General Seed	General Seed
AMS_EVENT_DAY	System	Five Four Three Two One	5 4 3 2 1
AMS_EVENT_FULFILL_ ON	System	On_Cancel On_Enroll On_Reg	On Cancellation On Enrollment On Registration
AMS_EVENT_FULFILL_ ON	System	On_Cancel On_Enroll On_Reg	On Cancellation On Enrollment On Registration
AMS_EVENT_LEVEL	System	Main Sub	Main Sub

Key	Type	Values	Meanings
AMS_EVENT_PAYMENT_ STATUS	System	Comp Free Invoiced Paid Refunded	Complimentary Free Invoiced Paid Refunded
AMS_EVENT_ PURPOSE	User	Organization defined values	Purpose for the event.
AMS_EVENT_REG_ CANCEL_REASON	System	Agenda_Change Cost Personal_Emergency Price_Change Sch_Conflict Speaker_Change Venue_Change Work_Emergency	Agenda Change Cost Personal Emergency Price Change Scheduling Conflict Speaker Change Venue Change Work Emergency
AMS_EVENT_REG_ SOURCE	System	Call_Center External On_Site Partner Web	Call Center External On Site Partner Web
AMS_EVENT_REG_ STATUS	System	Cancelled Enrolled Registered Targeted Waitlisted	Cancelled Enrolled Registered Targeted Waitlisted
AMS_EVENT_RESOURCE_ TYPE	System	AMS_People	People
AMS_EVENT_ SCHEDULE_ OBJECTIVE	User	Organization defined values	Objective for the event.

Key	Type	Values	Meanings
AMS_EVENT_SPEAKER_ STATUS	System	Booked Cancelled Confirmed Scheduled	Booked Cancelled Confirmed Scheduled
AMS_EVENT_STATUS	System	Active Archived Available Cancelled Closed Completed Denied_BA Denied_TA New On_Hold Submitted_ BA Submitted_TA Planning	Active Archived Available Cancelled Closed Completed Denied Budget Approval Denied Concept Approval New Active, but locked Pending Budget Approval Pending Concept Approval Planning
AMS_EVENT_STREAM_ TYPE	System	A B C D	A B C D

Key	Type	Values	Meanings
AMS_EVENT_TYPE (Event Activities)	System	Briefing Conference Exhibition Hospitality Internal_Event Launch Seminar Speaking_ Engagement Sponsorship_Event Trade_Show Web_Seminar Workshop	Briefing Conference Exhibition Hospitality Internal Event Launch Seminar Speaking Engagement Sponsorship Trade Show Web Seminar Workshop
AMS_EVENT_WAITLIST_ ACTION	System	First_Come_First	First Come First Served
AMS_FUND_ SOURCE	System	CAMP EVEH EVEO FUND CSCH DELV EONE OFFR PTNR OPTN VEND USER	Campaign Event Event Schedule Budget Campaign Schedule Deliverable One Off Event Offer Partner Other Partner Vendor Person

Key	Type	Values	Meanings
AMS_FUND_ STATUS	System	Active	Active
		Archived	Archived
		Cancelled	Cancelled
		Closed	Closed
		Draft	Draft
		On_Hold	On Hold
		Pending	Pending Approval
		Rejected	Rejected
AMS_FUND_ TYPE	System	Fixed	Fixed
		Fully_ Accrued	Fully Accrued
AMS_GL_ DATE_TYPE	System	Claim_Date	Claim Date
		Due_Date	Due Date
		System_Date	System Date
AMS_GL_ EVENT_ LINE_ TYPE	System	Accrual_Liability	Accrual Liability
		Expense_Account	Expense Account
		Rec_Clearing	Receivable Clearing Acct.
		Ven_Clearing	Vendor Clearing Account
AMS_GL_ EVENT_ STATUS	System	Accounted	Accounted
		Accounted_With_ Error	Accounted with Error
		Created	Created a New Transaction
AMS_GL_ EVENT_TYPE	System	Accrual	Accrual Liability
		Accrual_Adjustment	Accrual Adjustment
		Contra_Charge	Settle by Contra Charge
		Settle_By_Credit	Settle by Credit Memo
		Settle_By_WO	Settle to Writing Off
		Settle_By_Check	Settle by Payment Voucher
AMS_ HISTORY_ RULES_ OBJECT	System	Claim	Claim

Key	Type	Values	Meanings
AMS_ IMPORT_ STATUS	System	New	New Import
		Staged	Entries are imported and available for viewing
		Scheduled	Import is setup and ready to be completed at the scheduled time.
		Completed	Import completed.
		Purged	Imported entries have been purged from the Marketing Import Table.
		Cancelled	The list import has been cancelled and may not be reactivated.
		Error	An error occurred during list import.
AMS_ IMPORT_ TYPE	System	Customer	Organizations, Persons and TCA data.
		Event	Event registration data.
		Lead	Leads data.
AMS_LIST_ ACT_TYPE	User	Employee List	Target group list selection type
		List	
AMS_LIST_ DEDUP_ TYPE	User	List	Type of Deduplication Rules to be applied.
		Import Consumers	
		Import Organizations	
AMS_LIST_GENERATION_ TYPE	System	Incremental	New entries added, old entries not deleted, entries not updated
		Standard	All old entries deleted, new entries added
		Update	New entries added, old entries not meeting criteria deleted, entry information updated
		Update No Purge	New entries added, old entries retained, entry information updated
AMS_LIST_ ROW_ SELECT_ TYPE	System	Nth Record	How to select rows during list generation. Standard is top down selection.
		Random	
		Standard	

Key	Type	Values	Meanings
AMS_LIST_ SEGMENT_ STATUS	User	Archived Available Cancelled Draft Expired	Archived Available Cancelled Draft Expired
AMS_LIST_ SEGMENT_ TYPE	System	Workbook SQL	Two types of segments supported. Based on a Discoverer workbook or an SQL statement.
AMS_LIST_ SELECTION_ ACTION	System	Include Exclude Intersect	How each selection is added to the list. Exclude means that all entries that exist in the excluded list are removed from the current list. Intersect causes the current list to become a list of only those entries which are on the intersected list and the current list.
AMS_LIST_ SELECTION_ TYPE	System	Segment Workbook Import List List SQL	Segment Workbook Import List List SQL
AMS_LIST_ STATUS	System	Archived Available Cancelled Draft Executed Executing Generating Locked New Pending Reserved Scheduled Validated Validating	Archived Available Cancelled Draft Executed Executing Generating Locked New Pending Reserved Scheduled Validated Validating

Key	Type	Values	Meanings
AMS_LIST_ TYPE	System	Manual List Standard List Suppression List Target Group	List of possible list types. Note where these appear in the program.
AMS_ LUMPSUM_ DISTRIBUTION_ TYPE	System	% Amt Qty	Percent Amount Quantity
AMS_ MASTER_ OBJECT_ TYPE	System	Camp CSCH EONE EVEH	Campaign Campaign Schedule One-Off Event Event
AMS_ MEDIA_ TYPE	System	Broadcast Deal Direct_Marketing Events Internet In_Store Public_Relations Trade_Promotion	Advertising Deal Direct Marketing Events Web Marketing In Store Press and Analyst Relations Trade Promotions
AMS_ OBJECT_ CLASS	System	Invoice Order Order_line PCHO	Invoice Order Order Line Purchase Order
AMS_OBJECT_USAGE_ TYPE	System	Created Used_By	Created Used By
AMS_OFFER_ DEAL_ CUSTOMER_ TYPES	Extensible	Buyer Customer List Segment	Buyer Group Customer List Segment
AMS_OFFER_ LUMPSUM_ PAYMENT	System	Accrue Check	Accrue Issue Check

Key	Type	Values	Meanings
AMS_OFFER_ STATUS	System	Active Closed Draft Rejected Closed Pending Pending_Active Archived Cancelled Completed Terminated Onhold	Active Closed Draft Budget Rejected Closed Pending budget approval Pending Active Archived Cancelled Completed Terminated On hold
AMS_OFFER_ TYPE	System	OID Lumpsum Order Accrual Off_Invoice Deal Terms	Promotional Goods Lump sum Order value Accruals Off Invoice Trade Deal Terms Upgrade
AMS_OFFER_LUMP_ CUST_ TYPES	System	Buyer Customer	Buyer Customer
AMS_ PARTNER_ HOLDING_ TYPE (Holding Owner)	System	PTNR VEND	Partner Vendor Only used when Partners Online is implemented.
AMS_ PAYMENT_ STATUS	System	Incomplete Interfaced Paid Pending	Incomplete Interfaced Paid Pending

Key	Type	Values	Meanings
AMS_PLCE_ LOCATION_ CODE	Extensible	Left1, Left2…Left7 Right1, Right2 … Right7 Top Bottom	Positions for placements
AMS_PLCE_ SITE_ CATEGORY	System	Oracle_Applications Other_Applications Affiliates	Oracle Applications Other Applications Affiliates
AMS_POST_ AUDIENCE_ TYPE	System	S L	Segment List
AMS_POST_ BUSPRIOR (Business Priority)	System	None Random Prod_list_ price Campaign_ Start_ Date Campaign_ End_ Date Campaign_ Priority	None Random (for all) List Price (for products only) Start Date, End Date, or Priority (for campaign schedules).
AMS_POST_ CATEGORY	System	Universal Rulebased	Posting types: Universal or based on a rule.
AMS_POST_ CND_DATA_ TYPE	System	Float String	Data Types returnable by Custom Condition Class.
AMS_POST_ COMP_ OPERATOR	System	EQ GTE LTE	Equal to Greater than or equal to Less than or equal to Used to compare shopping cart amount.
AMS_POST_ CONTENT_ TYPES	System	Product Schedule Offer	Product Web Advertisement Web Offer
AMS_POST_ PREDEF_ PROD_ CONTEXT	System	Prod_viewed Prod_in_cart	The product context for relationship based strategy.

Key	Type	Values	Meanings
AMS_POST_ RELATIONSHIPS	System	Promoting Relationship types not covered by *i*Store	Promoting is a relationship not covered by *i*Store, as in promoting a product.
AMS_POST_ STATUS	System	Active Inactive	
AMS_POST_ STRATEGY_ TYPE	System	Manual_ Selection Product_ Relationship Inferred_OP Custom	Manually selected strategy Strategy based on product relationship Inferred based on Personalization Custom strategy
AMS_ PRICE LIST_ STATUS	System	Active Draft Rejected Pending Cancelled	Active Draft Rejected Pending Budget Approval Cancelled
AMS_PRIOR_ SORT_ ORDER	System	Asc Desc	Ascending Descending
AMS_ PRIORITY	System	Fast_Track High Standard	Fast Track High Standard
AMS_ PRODUCT_ LEVEL	System	Product Family	Product Product Family
AMS_ PROGRAM_ OBJECTIVE	User	User Defined	
AMS_ PROGRAM_ STATUS	System	Active Archived Cancelled Completed New On_Hold	Active Archived Cancelled Completed New Active, but locked

Key	Type	Values	Meanings
AMS_QP_ ARITHMETIC _ OPERATOR	System	% Amt Lumpsum Newprice	Percent Amount Lump sum New Price
AMS_QP_ VOLUME_ TYPE	System	Pricing_Attribute10 Pricing_Attribute12	Quantity Amount
AMS_QUARTERS	System	Q1 Q2 Q3 Q4	Q1 Q2 Q3 Q4
AMS_ REASON_ CODE_ TYPE	User	Adjust_Reason Invoicing_Reason	Adjustment Reason Invoicing Reason
AMS_ ROLLUP_ TYPE	Extensible	Coll Deal ECAM EVCAM Partner RCAM TRDP	Collection Deal Campaign Event Promotions Partner Program Trade Promotion
AMS_ SCHEDULE_ OBJECTIVE	User	User Defined	
AMS_ TRANSFER_ REASON	User	Sourcing	Initial Sourcing
AMS_ TRANSFER_ TYPE	Extensible	Release Reserve Transfer Request Utilized	Release Reserve Transfer Request Utilized
AMS_ TRIGGER_ CHK_ METRIC_ TYPE	System	Actual Forecast	Actual Value Forecast Value

Key	Type	Values	Meanings
AMS_ TRIGGER_ CHK_ TYPE	System	DIWB Metric Static_Value	Workbook Metric Static Value
AMS_ TRIGGER_ FREQUENCY_TYPE	System	Daily Hourly Monthly None Quarterly Weekly Yearly	The frequency of trigger checking
AMS_ TRIGGER_ TYPE	System	Metric_Metric Metric_Value Metric_ Workbook	Metric to Metric type trigger Metric to Value type trigger Metric to Workbook type trigger
AMS_ UTILIZATION_ TYPE	System	Accrual Adjustment Sales_ Accrual Utilized	Accrual Adjustment Sales Accrual (refers to the salesperson) Utilized
AMS_VALUE_ LIMIT	Extensible	Balance Committed Paid Planned Utilized	Balance Committed Paid Planned Utilized
AMS_YEARS	System	1995 1996 1997 1998 1999 2000 2001 2002	1995 1996 1997 1998 1999 2000 2001 2002

Key	Type	Values	Meanings
IBE_ RELATIONSHIP_ TYPES	Extensible	Possible relationships between Products like Cross Sell, Up Sell.	This is an *i*Store lookup type.
INVENTORY_ ITEM_ STATUS_ CODE	User	ACTIVE INACTIVE	Active Inactive

Key	Type	Values	Meanings
ITEM_TYPE	Extensible	AI	ATO Option Class
		AOC	ATO item
		ATO	ATO model
		CONSULTING	Contracts - consulting
		EDU	Contracts - Education
		FG	Contracts - KIT
		FRT	Contracts - Media
		I	Contracts - Software
		K	License
		KIT	Contracts - Training
		M	Finished good
		MEDIA	Freight
		NRI	Inventory Type
		OC	Kit
		OP	Model
		P	Non-recurring
		PF	Option Class
		PH	Outside Processing Item
		PL	PTO Option Class
		POC	PTO model
		PTO	Phantom item
		REF	Planning
		RI	Product Family
		SA	Purchased Item
		SI	Recurring
		SW LIC	Reference Item
		TRAIN	Subassembly supply item

E

Summary of Administration Setups

This appendix provides a table of the Administration Setups used by Oracle Marketing Online. The Components are listed in Side Navigation Menu item order.

Component	Item	Choices	Effect
General	Marketing Medium	User Created	Create the marketing mediums that will be used in campaign schedules and relate each to the appropriate activity. Depending on the Activity type and the Activity used by the campaign schedule, these marketing mediums will populate the LOV in the campaign schedules page.
General	Metric	User created and seeded	Create the metrics that will be used for tracking campaigns and campaign schedules. These metrics will be available in the LOV of campaigns and campaign schedules. See Implementing Metrics.
General	Venues	User Created	Create the venues that will be used in event schedules.
Setup	Custom Setup	User created and seeded	Create the custom setups that will be used for campaigns, events and other objects. These choices will populate the setup type LOVs.
Setup	Activity	User created and seeded	Create the activities that will be used for various marketing objects. These choices will populate the activity LOV.
Setup	User Status	User created and seeded	Create the user statuses that will be used for various marketing objects.

Component	Item	Choices	Effect
Setup	Locking Rule	User created and seeded	Create the locking rules that are determined by the organization's Business Rules. Fields specified here will be locked for update at the statuses specified.
Setup	Mandatory Rule	User created and seeded	Create the mandatory rules that are determined by the organization's Business Rules. Fields specified here are must be completed during object creation.
Setup	Approval Rule	User created	Create the approval rules budget and theme approvals for campaigns, budgets and other objects.
Geography	Geographic Area	User created and seeded	Create the geographic areas that will be used by Marketing Online, if required. After creating the Geographic Areas, log into Forms and run the concurrent manager program Load Geographic Hierarchies. This must be done each time the geographic areas are updated.
Claim	Reasons		Reasons are required when creating claims and reason LOV is based on values from this page.
Claim	Claim Type		Claims types are required when creating claims and claim the LOV is based on the values from this page.
Claim	System Parameter	Select a Set of Books from the LOV.	The set of books will be used for all functional-transactional currency conversion and posting to GL for all marketing objects. This should not be changed once implemented.
Claim	System Parameter	Post to GL Yes or No	If set to Yes general ledger accounting will be done for all budget adjustments and accruals.
Claim	System Parameter	GL Account Codes	Enter the account code for the accrual liability account. This account will be used by default for posting to accrual liability account if not defined at fund category, fund or by the accounting engine.
Claim	System Parameter	Select or deselect Auto Assignment checkbox	If selected, claim owners will be defaulted to the winning resource derived from claims territory implementation.

Component	Item	Choices	Effect
Claim	System Parameter	Select or deselect	If autopay flag selected, when autopay engine is run, this claim type and reason will be used and run for the frequency mentioned for all customers unless defined in trade profile.
Claim	System Parameter	List of claim types and reasons	
Claim	System Parameter	Select from transaction types of class Credit Memo defined in Oracle Receivables	The credit memo is used to create a credit memo in Oracle Receivables to settle a claim.
Claim	System Parameter	User defined number of days	Claim due date will be default to this future date.
Claim	System Parameter	Select from transaction types of class Debit Memo defined in Oracle Receivables	The debit memo is used to create a debit memo in Oracle Receivables to settle a claim.
Claim	System Parameter	List of Resources of type "Employee" and "Partner"	Claims not created manually (deductions, autopay claims) will have the owner assigned to them as defined here. Default owner will be taken if Territory Manager not implemented or if it does not return a suggested default owner for the claim.
Claim	System Parameter	Select an exchange rate from GL	This conversion type will be used when not specified during creation of a claim.
Claim	System Parameter	User determined	Enter a number and select a Frequency Unit from: Days, Months, Quarters, Weeks, Year.
Claim	System Parameter	Claim date, Due date, System date	GL Date will default to the select date type.
Claim	System Parameter	List of payment terms defined in AP	If a value is set, check payments made from claims will have this payment term.

Component	Item	Choices	Effect
Claim	System Parameter	List of values defined for lookup type 'SOURCE' in ap_lookups	Invoices created in payables will have the invoice source. Used for running Payables Open Interface Import program.
Claim	System Parameter	Select or deselect Post to GL Flag	If selected GL accounting will post to GL.
Claim	System Parameter	GL Account Codes	Enter the account code for the receivable clearing account. This account will be used by default for posting to the receivable clearing account if not defined at fund category, fund or by the accounting engine.
Claim	System Parameter	Select from the Batch Sources of type "Import" defined in Oracle Receivables	The batch source is used to create Transactions in Oracle Receivables that are used to settle claims.
Claim	System Parameter	GL Account Codes	Enter the account code for the sales/expense account. This account will be used by default for posting to expense account if not defined at fund category, fund or by the accounting engine.
Claim	System Parameter	List of claim types and reasons defined in Admin > Claim	This claim type and reason will be used for all automatic payments of accruals and earnings.
Claim	System Parameter	GL Account Codes	Enter the account code for the vendor clearing account. This account will be used by default for posting to the vendor clearing account if not defined at fund category, fund or by the accounting engine.
Claim	Trade Profile	Select or deselect checkbox	Determines whether Autopay will be in effect for the selected Vendor.
Claim	Trade Profile	User defined	Indicates how often Autopay will test to see if a payment is required.

Component	Item	Choices	Effect
Claim	Trade Profile	List of vendors created in AP	Select a vendor to setup. Autopay will be run for the particular party/account based on the flag and will be run for the frequency mentioned with amount condition overriding the duration. For check payments vendor set in this profile will be used.
Claim	History Rule	Columns updateable in claim, general, lines and settlement	When any of the columns selected for history creation changes, a snapshot of the claim gets created as a history record.
Execution	Strategies	User Created and Seeded	Any additional custom strategies that are needed are created here. A java class is required which contains the logic and code.
Execution	Conditions	User Created	Extend up to five conditions that can be used in rule definitions for a rule-based posting.
Execution	Sites	User Created and Seeded	Create a new site here.
Execution	Pages	User Created and Seeded	Create new pages for a site.
Execution	Styles	User Created and Seeded	Create new styles for content type(s).

F

Summary of Request Sets and Concurrent Manager Programs

This appendix provides a table of the Request Sets and Concurrent Manager Programs used by Oracle Marketing Online.

Request Sets

Request sets are sets of concurrent manager programs which may be executed as a group. If desired, any concurrent manager program which is part of a request set may be executed individually.

For more information on the particular concurrent manager programs which are part of a request set, see the table of concurrent manager programs.

Request Set Name	Concurrent Manager Programs
BIM: Load Marketing Facts for the First Time	BIM: Load Marketing Facts for the First Time, Object to Load: Campaign
	BIM: Load Marketing Facts for the First Time, Object to Load: Event
	BIM: Load Marketing Facts for the First Time, Object to Load: Budget
	BIM: Load Key Performance Indicator Facts
BIM: Initial Build of Materialized Views	BIM: Initial Build of Campaign Materialized Views
	BIM: Initial Build of Event Materialized Views
	BIM: Initial Build of Budget Materialized Views
	BIM: Initial Build of Key Performance Indicators Materialized Views

Request Set Name	Concurrent Manager Programs
BIM: Refresh Materialized Views	BIM: Refresh Campaign Materialized Views
	BIM: Refresh Event Materialized Views
	BIM: Refresh Budget Materialized Views
	BIM: Refresh Key Performance Indicators Materialized Views
	BIM: Refresh Marketing Activities Materialized Views
BIM: Load Marketing Facts from Previous Refresh Date	BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Campaign
	BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Event
	BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Budget
	BIM: Load Key Performance Indicator Facts from Previous Refresh Date

Concurrent Manager Programs

Concurrent Manager	Required	Description
Activate Event Schedules	Yes	This will pick up all the Event Schedules which are in Available status and for which the start date has passed and its Event is active and make the Schedule Active.
AMS Activate Schedule	Optional	This will pick up all the Campaign Schedules which are in Available status and for which the start date has passed and its Campaign is active and make the Schedule Active.
AMS Expire Data Mining Models	Yes	Background process that monitors data mining models to see if they have expired. A frequency of once a day should be sufficient.
AMS: Generate Suppression list	Optional	Updates and maintains organization defined suppression lists. This is in addition to seeded suppression lists.
AMS Group Access Refresh	Yes	Updates denormalized tables with group information. Should be run on a periodic basis according the organization's Business Rules.
AMS Load Inventory Categories	Yes	Loads categories from the MTL schema to the AMS schema denormalized tables. This program should be run if and when a new category is created in Inventory.

Concurrent Manager	Required	Description
AMS - Metrics refresh program	Optional	Refreshes Metrics. There is an optional parameter to record metrics history.
AMS Portal Cache Daemon	Yes	Populates the Marketing subtab on the Home tab.
AMS: Purge Imported List	Optional	During the import process, the user may specify an expiration date or number of uses for a list. This program removes those entries whose expiration date has passed or number of uses reached. Optional Parameter: force_purge_flag. This parameter indicates whether to purge a record regardless of the associated campaign status. The default value is No.
AMS: Purge Target Group	Optional	After a target group has been generated and used, this program lets a user purge the list entries.
AMS: Refresh Party Market Segments	Optional	Generates a list of parties in the segment. This program also updates the size information for all segments so a history of segment sizes may be maintained.
AMS Team Access Refresh	Yes	Updates denormalized tables with team information. Should be run on a periodic basis according to the organization's Business Rules.
AMS-TM: Funds Accrual Engine	Yes	Ability to calculate budget utilization and earnings based on ship confirmed orders (provided the offer's phase is set to 'Ship', else the accruals will be calculated at the phase the offer is applied). In case of Fully Accrued type of Budgets with accrue to is 'customer', Budget, Committed and Earned columns are to be updated with the accrued amount. But in case of budgets with accrue to 'Sales', only Budget column will have to be updated. Committed and Earned should not be populated. This allows users to transfer money from Fully accrued budget to any other Fixed Budgets. If max cap is specified against the Fully accrued budget, the budget can be accumulated only to the level of max cap. Parameters: None.
AMS-TM: Import Territory Hierarchy	Yes	This concurrent program uploads the hierarchy data from jtf_territories to AMS schema to be able to perform budget allocation to that territory hierarchy. The concurrent program expects a hierarchy id meaning which particular hierarchy the user wants to import. Parameters: Hierarchy Id

Concurrent Manager	Required	Description
AMS-TM: Release Committed Budget Amount After Grace Period	Yes	A budget has been committed for an offer or any other activity. The Activity or offer date has ended or the offer is going to be closed or canceled. There might be a situation that the budget has not been utilized completely. This feature can be implemented through a concurrent process would return back the unused committed amount back to the sourcing budget. If there is a grace period, release of committed amount from a fixed type fund would take place whenever a offer is closed or canceled after the attainment of the grace period. Parameters: p_object_type (Object Type, for example, CAMP, OFFR, EVEH)
AMS-TM: Validate Budget Thresholds	Yes	Threshold Alert provides the feature to monitor over spending or under spending from time to time. The concurrent program performs the automatic process of verification and notifies the owner of the budget on over & under utilization. Parameters: None
AMS-TM Utilize Lumpsum Offers	Yes	A user initiated background process that will account budget utilizations against lumpsum offer whenever the offer start date arrives rather than on offer approved or created date. In case when the Offer is active on the date when Offer was created, then the budget utilization will be updated immediately.
AMS-TM: Claims Aging Population	Yes	Claims aging program populates the summary table for the claims aged by customer for an aging bucket. Aging will be run based on the system date. This program has to be run on a daily basis to get the daily aging analysis for the customers. Claims may be aged using a future type. This type will display claims that will become due, based on the Due Date, the specified number of days in the future. Parameter: Aging bucket defined in Oracle Receivables

Concurrent Manager	Required	Description
AMS-TM: Claims Autopay	Yes	Autopay program is used to pay accruals on a regular basis to customers. Autopay can be set up to pay accruals based on a customer, budget, campaign or offer. Parameters: ■ Customer ■ Budget ■ Offer ■ Campaign
AMS-TM: Claims Settlement Fetcher	Yes	Settlement fetcher gets the settlement data created in receivables and payables after settling a claim. Claim settlement on a manual claims gets created through autoinvoice or payables invoice import. These are programs which run on a batch mode and after the actual payment gets created in receivables or payables, settlement fetcher has to be run to get the settlement data to be shown in claims. Parameters: None
AMS-TM: Import Claims	Yes	Import Claims imports the data from interface tables into claims. This program runs through the standard validations for claims creation and rejects the claims that are not successful for import. Parameters: None
AMS-TM: Perform Recalculated Commitment for Offers	Optional	Performs recalculation of committed budget for offers.
AMS-TM: Transfer to General Ledger	Yes	Transfer to General Ledger is run to transfer the sub-ledger accounting entries created by claims/accruals into General Ledger accounting tables. Parameters: ■ Selection Type (1-Batch Transfer) ■ Set Of Books - Primary set of books ■ Transfer Reporting Books - Yes/No ■ Batch Name - Name of batch for transfer

Concurrent Manager	Required	Description
AMS Update Data Mining Models	Optional	Updates detail information collected on parties. The frequency should be the same as the BIC Summary Extraction process.
AutoInvoice - Oracle Receivables	Yes	AutoInvoice is an Oracle Receivables concurrent program used to create credit memos/debit memos in receivables. It is used for creating credit memos on settling manual claims. Claims settled with receivables payment method gets created with the batch source defined in system parameters. For more information on parameters and options see the Oracle Receivables Implementation Guide.
BIM: Load Marketing Facts for the First Time	Optional	Loads all Campaign Facts for the first time. Repeat for each object: Campaign, Event, Budget. Parameters: Object to Load: Campaign Start Date End Date Part of the Request Set: BIM: Load Marketing Facts for the First Time
BIM: Load Key Performance Indicator Facts	Optional	Loads KPI Facts. Part of the Request Set: BIM: Load Marketing Facts for the First Time
BIM: Initial build of Campaigns Materialized Views	Optional	Prepares pre-built tables for Campaign Materialized Views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Initial build of Materialized Views
BIM: Initial build of Events Materialized Views	Optional	Prepares pre-built tables for Events Materialized Views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Initial build of Materialized Views

Concurrent Manager	Required	Description
BIM: Initial build of Budgets Materialized Views	Optional	Prepares pre-built tables for Budgets Materialized Views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Initial build of Materialized Views
BIM: Initial build of Key Performance Indicators Materialized Views	Optional	Prepares pre-built tables for Key Performance Indicators Materialized Views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Initial build of Materialized Views
BIM: Refresh Campaign Materialized Views	Optional	Builds Campaigns Materialized views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh Materialized Views
BIM: Refresh Events Materialized Views	Optional	Builds Events Materialized views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh Materialized Views
BIM: Refresh Budgets Materialized Views	Optional	Builds Budgets Materialized views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh Materialized Views
BIM: Refresh Key Performance Indicators Materialized Views	Optional	Builds Key Performance Indicators Materialized views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh Materialized Views
BIM: Refresh Marketing Activities Materialized Views	Optional	Builds Marketing Activities Materialized Views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh Materialized Views

Concurrent Manager	Required	Description
BIM: Load Marketing Facts from previous refresh date	Optional	Loads all facts from the previous refresh date. Repeat for each object: Campaign, Event, Budget. Parameters: Object to Load: Campaign End Date Number of Parallel Processors: 4 Part of the Request Set: Load Marketing Facts from previous refresh date
BIM: Load Key Performance Indicator facts from previous refresh date	Optional	Loads all KPI facts from the previous refresh Date.
Initial Build of Campaigns mvs		Obsolete in Release 7. Replaced by BIM: Initial Build of Campaigns Materialized Views.
Initial Build of Events mvs		Obsolete in Release 7. Replaced by BIM: Initial Build of Events Materialized Views.
Initial Build of Funds mvs		Obsolete in Release 7. Replaced by BIM: Initial Build of Budgets Materialized Views.
Load Geographic Hierarchies	Yes	This program must be run each time that the geographies are changed.
Marketing Facts Load		Obsolete in Release 7. Replaced by BIM: Load Marketing Facts for the First Time.
Marketing Materialized views prebuilt tables (AMS)		Obsolete in Release 7. Replaced by BIM: Initial Build of Materialized Views
Marketing Materialized views Refresh (AMS)		Obsolete in Release 7. Replaced by BIM: Refresh Materialized Views

Concurrent Manager	Required	Description
Payables Open Interface Import - Oracle Payables	Yes	Payables open interface import is an Oracle Payables concurrent program used to create invoices in payables. It has to be run for the batch source defined in system parameters since all the claims settlement for payables get created with that batch source. For more information on parameters and options see the Oracle Payables Implementation Guide.
Refresh of Campaigns mvs		Obsolete in Release 7. Replaced by BIM: Refresh Campaigns Materialized Views.
Refresh of Events mvs		Obsolete in Release 7. Replaced by BIM: Refresh Events Materialized Views.
Refresh of Funds mvs		Obsolete in Release 7. Replaced by BIM: Refresh Budgets Materialized Views.
Web Execution: Refresh Campaign Items	Yes	Information about Campaigns is stored in multiple tables. To improve runtime performance, this program periodically collects required information on campaigns and places it into a single table.
Web Execution: Refresh Offer Parties and Products	Yes	This program loads offer party and product information into denormalized tables. This information will be used in validating budget eligibility and web offer recommendations. For the input parameter p_incremental_flag, enter Y to load only new information or N to reload all information.
Web Execution: Refresh Minisite Items	Yes	This refreshes the denormalized table for minisites periodically to capture items in the *i*Store minisites.
Workflow Background Engine AMS Models Build/ Score	Yes	Choose item “AMS Models Build/Score” for the Workflow daemon to monitor data mining workflow requests. For data mining operations, a frequency of 30 minutes should be sufficient.
Workflow Background Process	Yes	Starts the Workflow engine.

Concurrent Manager	Required	Description
Workflow Background Process	Yes	Parameters required: ■ Set Item Type: AMS Marketing Approvals for Marketing Approvals or OMO Triggers for Triggers (select from available values). ■ Minimum Threshold: Leave blank. ■ Maximum Threshold: Leave blank. ■ Process Deferred: Yes ■ Process Timeout: Yes The concurrent process is required to process the approvals.

G

List Import Fields

This appendix provides tables of all of the List Import table fields used by Oracle Marketing Online. Please see the chapter on Implement List Import for more information on these tables.

List Import Fields

The following sections describe the fields which can be used in list import. There are four sections B2B List Import, B2C List Import, Event Import and Lead Import.

B2B List Import

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ADDRESS_LINES_ PHONETIC	VARCHAR2(150)				
ADDRESS1	VARCHAR2(150)				Required every time if address is required.
ADDRESS2	VARCHAR2(150)				
ADDRESS3	VARCHAR2(150)				
ADDRESS4	VARCHAR2(150)				
ANALYSIS_FY	VARCHAR2				
APARTMENT_FLAG	VARCHAR2				
BEST_TIME_CONTACT_ BEGIN	DATE				
BEST_TIME_CONTACT_ END	DATE				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
CATEGORY_CODE	VARCHAR2				
CEO_NAME	VARCHAR2(50)				
CITY	VARCHAR2(60)			Select distinct location_ segment_description, location_segment_ user_value from ar_ location_values where location_segment_ qualifier = 'CITY'	
COUNTRY	VARCHAR2(60)			Select territory_short_ name, territory_code, description from fnd_ territories_vl	Required only if any of address columns are provided in the data file.
COUNTY	VARCHAR2(60)			Select distinct location_ segment_description, location_segment_ user_value from ar_ location_values where location_segment_ qualifier = 'COUNTRY'	
CREATED_BY	NUMBER	Yes			Populated by the list import program.
CREATION_DATE	DATE	Yes			Populated by the list import program.
CURR_FY_POTENTIAL_ REVENUE	NUMBER				
DECISION_MAKER_ FLAG	VARCHAR2(1)				
DEDUPE_KEY	VARCHAR2(150)				Populated by the list import program.
DEPARTMENT	VARCHAR2(60)				
DUNS_NUMBER	NUMBER				
EMAIL_ADDRESS	VARCHAR2(150)				
EMPLOYEES_TOTAL	NUMBER				
FISCAL_YEAREND_ MONTH	VARCHAR2(30)				
FLOOR	VARCHAR2				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
GSA_INDICATOR_FLAG	VARCHAR2				
HOUSE_NUMBER	VARCHAR2				
IMPORT_LIST_HEADER_ ID	NUMBER	Yes			Auto Generated
IMPORT_SOURCE_LINE_ ID	NUMBER	Yes			Auto Generated
IMPORT_SUCCESSFUL_ FLAG	VARCHAR2(1)				
JGZZ_FISCAL_CODE	VARCHAR2				
JOB_TITLE	VARCHAR2(60)				
LAST_ORDERED_DATE	DATE				
LAST_UPDATE_DATE	DATE	Yes			Populated by the list import program.
LAST_UPDATE_LOGIN	NUMBER	Yes			Populated by the list import program.
LAST_UPDATED_BY	NUMBER	Yes			Populated by the list import program.
LEGAL_STATUS	VARCHAR2(30)				
LINE_OF_BUSINESS	VARCHAR2(30)				
MISSING_STATEMENT	VARCHAR2				
NEXT_FY_POTENTIAL_ REVENUE	NUMBER				
OBJECT_VERSION_ NUMBER	NUMBER	Yes			Populated by the list import program.
ORGANIZATION_ NAME_PHONETIC	VARCHAR2				
OVERSEAS_ADDRESS_ FLAG	VARCHAR2				
PARTY_NAME	VARCHAR2(150)		Yes		This is a required column for B2B type data.
PERSON_FIRST_NAME	VARCHAR2(150)				
PERSON_LAST_NAME	VARCHAR2(150)				
PERSON_MIDDLE_ NAME	VARCHAR2(60)				
PERSON_NAME_SUFFIX	VARCHAR2(30)				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PERSON_TITLE	VARCHAR2(60)				
PHONE_AREA_CODE	VARCHAR2(10)				
PHONE_COUNTRY_ CODE	VARCHAR2(10)				
PHONE_EXTENTION	VARCHAR2(20)				
PHONE_NUMBER	VARCHAR2(40)				Required if any of the phone information is provided.
PO_BOX_NUMBER					
POSTAL_CODE	VARCHAR2(60)			Select min(p.from_ postal_code), Max(p.to_postal_code) from Ar_postal_code_ ranges_v p, Ar_location_values a where p.location_segment_id = a.location_segment_ id and a.location_ segment_qualifier = 'CITY' and a.location_segment_ value like 'X%'	
POSTAL_PLUS4_CODE					
PROVINCE	VARCHAR2(60)			Select distinct location_ segment_description, location_segment_ user_value from ar_ location_values where location_segment_ qualifier = 'PROVINCE'	
RURAL_ROUTE_ NUMBER	VARCHAR2				
RURAL_ROUTE_TYPE	VARCHAR2				
SECONDARY_SUFFIX_ ELEMENT	VARCHAR2				
SIC_CODE	VARCHAR2				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
SIC_CODE_TYPE	VARCHAR2				
SITE_USE_TYPE	VARCHAR2				
STATE	VARCHAR2(60)			Select distinct location_ segment_description, location_segment_ user_value from ar_ location_values where location_segment_ qualifier = ‘STATE’	
STREET	VARCHAR2				
STREET_NUMBER	VARCHAR2				
STREET_SUFFIX	VARCHAR2				
SUITE	VARCHAR2				
TAX_NAME	VARCHAR2				
TAX_REFERENCE	VARCHAR2(50)				
TIME_ZONE	VARCHAR2150)				Numeric value indicating the number of hours from Greenwich mean time.
TOTAL_NUM_OF_ ORDERS	NUMBER				
TOTAL_ORDERED_ AMOUNT	NUMBER				
YEAR_ESTABLISHED	NUMBER(4)				

B2C List Import

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ADDRESS_LINES_ PHONETIC	VARCHAR2				
ADDRESS1	VARCHAR2(150)				Required every time if address is required.
ADDRESS2	VARCHAR2(150)				
ADDRESS3	VARCHAR2				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ADDRESS4	VARCHAR2				
APARTMENT_FLAG	VARCHAR2				
BEST_TIME_CONTACT_ BEGIN	DATE				
BEST_TIME_CONTACT_ END	DATE				
CITY	VARCHAR2(60)			Select distinct location_ segment_description, location_segment_ user_value from ar_ location_values where location_segment_ qualifier = 'CITY'	
COUNTRY	VARCHAR2(60)			Select territory_short_ name, territory_code, description from fnd_ territories_vl	Required only if any of address columns are provided in the data file.
COUNTY	VARCHAR2(60)			Select distinct location_ segment_description, location_segment_ user_value from ar_ location_values where location_segment_ qualifier = 'COUNTRY'	
CREATED_BY	NUMBER	Yes			Populated by the list import program.
CREATION_DATE	DATE	Yes			Populated by the list import program.
DEDUPE_KEY	VARCHAR2(150)				Populated by the list import program.
EMAIL_ADDRESS	VARCHAR2(150)				
FLOOR					
GENDER	VARCHAR2(30)				
HOUSE_NUMBER					
HOUSEHOLD_INCOME	NUMBER				
IMPORT_LIST_HEADER_ ID	NUMBER	Yes			Auto Generated

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
IMPORT_SOURCE_LINE_ ID	NUMBER	Yes			Auto Generated
IMPORT_SUCCESSFUL_ FLAG	VARCHAR2(1)				
LAST_UPDATE_DATE	DATE	Yes			Populated by the list import program.
LAST_UPDATE_LOGIN	NUMBER	Yes			Populated by the list import program.
LAST_UPDATED_BY	NUMBER	Yes			Populated by the list import program.
OBJECT_VERSION_ NUMBER	NUMBER	Yes			Populated by the list import program.
OVERSEAS_ADDRESS_ FLAG	VARCHAR2				
PERSON_FIRST_NAME	VARCHAR2(150)		Yes		This is a required column in the data file for B2C type of data
PERSON_LAST_NAME	VARCHAR2(150)		Yes		This is a required column in the data file for B2C type of data
PERSON_MIDDLE_ NAME	VARCHAR2(60)				
PERSON_NAME_SUFFIX	VARCHAR2(30)				
PERSON_PRE_NAME_ ADJUNCT					
PERSON_TITLE	VARCHAR2(60)				
PHONE_AREA_CODE	VARCHAR2(10)				
PHONE_COUNTRY_ CODE	VARCHAR2(10)				
PHONE_EXTENTION	VARCHAR2(20)				
PHONE_NUMBER	VARCHAR2(40)				Required if any of the phone information is provided.
PO_BOX_NUMBER	VARCHAR2				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
POSTAL_CODE	VARCHAR2(60)			Select min(p.from_ postal_code), Max(p.to_postal_code) from Ar_postal_code_ ranges_v p, Ar_location_values a where p.location_segment_id = a.location_segment_ id and a.location_ segment_qualifier = 'CITY' and a.location_segment_ value like 'X%'	
POSTAL_PLUS4_CODE					
PROVINCE	VARCHAR2(60)			Select distinct location_ segment_description, location_segment_ user_value from ar_ location_values where location_segment_ qualifier = 'PROVINCE'	
RURAL_ROUTE_ NUMBER	VARCHAR2				
RURAL_ROUTE_TYPE	VARCHAR2				
SALUTATION	VARCHAR2				
SECONDARY_SUFFIX_ ELEMENT	VARCHAR2				
SITE_USE_TYPE	VARCHAR2				
STATE	VARCHAR2(60)			Select distinct location_ segment_description, location_segment_ user_value from ar_ location_values where location_segment_ qualifier = 'STATE'	
STREET	VARCHAR2				
STREET_NUMBER	VARCHAR2				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
STREET_SUFFIX	VARCHAR2				
SUITE	VARCHAR2				
TIME_ZONE	VARCHAR2150)				Numeric value indicating the number of hours from Greenwich mean time.

Event List Import

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ACTIVE_FLAG	VARCHAR2(1)				
ATTENDANCE_ FAILURE_REASON	VARCHAR2(30)			AMS_EVENT_ ATTENDANCE_ FAILURE_CODE LOOKUP	
ATTENDANCE_RESULT_ CODE	VARCHAR2(30)				
ATTENDANT_ ACCOUNT_ID	NUMBER			CUSTOMER_ ACCOUNT_ID	
ATTENDANT_ CONTACT_ID	NUMBER		Yes	CONTACT_ID	
ATTENDANT_ LANGUAGE	VARCHAR2(30)				
ATTENDANT_PARTY_ID	NUMBER			PARTY_ID	
ATTENDED_FLAG	VARCHAR2(1)				
ATTRIBUTE_CATEGORY	VARCHAR2(30)				
ATTRIBUTE1	VARCHAR2(150)				
ATTRIBUTE10	VARCHAR2(150)				
ATTRIBUTE11	VARCHAR2(150)				
ATTRIBUTE12	VARCHAR2(150)				
ATTRIBUTE13	VARCHAR2(150)				
ATTRIBUTE14	VARCHAR2(150)				
ATTRIBUTE15	VARCHAR2(150)				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ATTRIBUTE2	VARCHAR2(150)				
ATTRIBUTE3	VARCHAR2(150)				
ATTRIBUTE4	VARCHAR2(150)				
ATTRIBUTE5	VARCHAR2(150)				
ATTRIBUTE6	VARCHAR2(150)				
ATTRIBUTE7	VARCHAR2(150)				
ATTRIBUTE8	VARCHAR2(150)				
ATTRIBUTE9	VARCHAR2(150)				
AUTO_REGISTER_FLAG	VARCHAR2(1)				
CANCELLATION_CODE	NUMBER				
CANCELLATION_ REASON_CODE	VARCHAR2(30)			AMS_EVENT_REG_ CANCEL_REASON LOOKUP	
CONFIRMED_FLAG	VARCHAR2(1)				
CREATED_BY	NUMBER	Yes			Populated by the list import program.
CREATION_DATE	DATE	Yes			Populated by the list import program.
DATE_REGISTRATION_ PLACED	DATE				
DESCRIPTION					
EVALUATED_FLAG	VARCHAR2(1)				
EVENT_OFFER_ID	NUMBER		Yes	AMS_EVENT_ OFFERS_ALL_B	
IMPORT_LIST_HEADER_ ID	NUMBER	Yes			Auto Generated
IMPORT_SOURCE_LINE_ ID	NUMBER	Yes			Auto Generated
IMPORT_SUCCESSFUL_ FLAG	VARCHAR2(1)				Populated by the list import program.
INBOUND_CHANNEL_ ID	NUMBER				
INBOUND_MEDIA_ID	NUMBER				
INVITE_ONLY_ OVERRIDE_FLAG	VARCHAR2(1)				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
LAST_REG_STATUS_DATE	DATE			Date when the registration closed.	
LAST_UPDATE_LOGIN	NUMBER	Yes			Populated by the list import program.
LAST_UPDATED_BY	NUMBER	Yes			Populated by the list import program.
MAX_ATTENDEE_OVERRIDE_FLAG	VARCHAR2(1)				
OBJECT_VERSION_NUMBER	NUMBER	Yes			Populated by the list import program.
ORDER_HEADER_ID	NUMBER				
ORDER_LINE_ID	NUMBER				
ORIGINAL_REGISTRANT_CONTACT_ID	NUMBER		Yes		
OWNER_USER_ID	NUMBER		Yes		
PAYMENT_STATUS_CODE	VARCHAR2(30)				
PROGRAM_APPLICATION_ID	NUMBER				
PROGRAM_ID	NUMBER				
PROGRAM_UPDATE_DATE	DATE				
PROSPECT_FLAG	VARCHAR2(1)				
REG_SOURCE_TYPE_CODE	VARCHAR2(30)			AMS_EVENT_REG_SOURCE_TYPE LOOKUP	
REGISTRANT_ACCOUNT_ID	NUMBER		Yes	CUSTOMER_ACCOUNT_ID	
REGISTRANT_CONTACT_ID	NUMBER		Yes	CONTACT_ID	
REGISTRANT_PARTY_ID	NUMBER		Yes	PARTY_ID	
REGISTRATION_GROUP_ID	NUMBER		Yes		
REGISTRATION_SOURCE_ID	NUMBER				
REQUEST_ID	NUMBER				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
SALESREP_ID	NUMBER				
SECURITY_GROUP_ID	NUMBER				
SOURCE_CODE	VARCHAR2(30)		Yes	AMS_EVENT_ OFFERS_ALL_B	
SYSTEM_STATUS_CODE	VARCHAR2(30)			AMS_EVENT_REG_ STATUS LOOKUP	
TARGET_LIST_ID	NUMBER				
USER_STATUS_ID	NUMBER		Yes	AMS_USER_STATUS LOOKUP	
WAITLISTED_PRIORITY	VARCHAR2(30)				

Lead List Import

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ACCEPT_FLAG					
ACTIVE_FLAG	VARCHAR2(1)				
ADDRESS_EFFECTIVE_ DATE	VARCHAR2				
ADDRESS_KEY	VARCHAR2				Stores the Address Key generated
ADDRESS_LINES_ PHONETIC	VARCHAR2				
ADDRESS_STYLE	VARCHAR2				
ADDRESSEE	VARCHAR2				
ASSIGN_DATE	VARCHAR2				
ASSIGN_SALES_GROUP_ ID	VARCHAR2				
ASSIGN_TO_PERSON_ID	VARCHAR2				
ASSIGN_TO_ SALESFORCE_ID	VARCHAR2				
ATTENDANCE_ FAILURE_REASON	VARCHAR2(30)			AMS_EVENT_ ATTENDANCE_ FAILURE_CODE LOOKUP	

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ATTENDANCE_RESULT_CODE	VARCHAR2(30)				
ATTENDANT_ACCOUNT_ID	NUMBER			CUSTOMER_ACCOUNT_ID	
ATTENDANT_CONTACT_ID	NUMBER		Yes	CONTACT_ID	
ATTENDANT_LANGUAGE	VARCHAR2(30)				
ATTENDANT_PARTY_ID	NUMBER			PARTY_ID	
ATTENDED_FLAG	VARCHAR2(1)				
ATTRIBUTE_CATEGORY	VARCHAR2(30)				
ATTRIBUTE1	VARCHAR2(150)				
ATTRIBUTE10	VARCHAR2(150)				
ATTRIBUTE11	VARCHAR2(150)				
ATTRIBUTE12	VARCHAR2(150)				
ATTRIBUTE13	VARCHAR2(150)				
ATTRIBUTE14	VARCHAR2(150)				
ATTRIBUTE15	VARCHAR2(150)				
ATTRIBUTE2	VARCHAR2(150)				
ATTRIBUTE3	VARCHAR2(150)				
ATTRIBUTE4	VARCHAR2(150)				
ATTRIBUTE5	VARCHAR2(150)				
ATTRIBUTE6	VARCHAR2(150)				
ATTRIBUTE7	VARCHAR2(150)				
ATTRIBUTE8	VARCHAR2(150)				
ATTRIBUTE9	VARCHAR2(150)				
AUTO_ASSIGNMENT_TYPE	VARCHAR2				
AUTO_REGISTER_FLAG	VARCHAR2(1)				
BUDGET_AMOUNT	NUMBER				
BUDGET_AMOUNT_1	NUMBER				
BUDGET_AMOUNT_2	NUMBER				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
BUDGET_AMOUNT_3	NUMBER				
BUDGET_AMOUNT_4	NUMBER				
BUDGET_AMOUNT_5	NUMBER				
BUDGET_STATUS_CODE	VARCHAR2				
CANCELLATION_CODE	NUMBER				
CANCELLATION_ REASON_CODE	VARCHAR2(30)			AMS_EVENT_REG_ CANCEL_REASON LOOKUP	
CHANNEL_CODE	VARCHAR2				
CLOSE_REASON	VARCHAR2				
CNT_PNT_CONTENT_ SOURCE_TYPE	VARCHAR2				This is a mandatory column in HZ_ CONTACT_POINTS, but if not given, default it to 'USER_ENTERED'
CNT_PNT_TIME_ZONE	VARCHAR2				
CONFIRMED_FLAG	VARCHAR2(1)				
CONTACT_KEY	VARCHAR2				Stores the Contact Key generated
CONTACT_NUMBER	VARCHAR2				
CONTACT_PARTY_ID	NUMBER				
CONTACT_ROLE_CODE	VARCHAR2				
CONTENT_SOURCE_ TYPE	VARCHAR2				This is a mandatory column in HZ_ LOCATIONS, but if not given, default it to 'USER_ENTERED'
CREATED_BY	NUMBER	Yes			Populated by the list import program.
CREATION_DATE	DATE	Yes			Populated by the list import program.
CURRENCY_CODE	VARCHAR2				
CUSTOMER_KEY	VARCHAR2				Stores the customer Key generated
DATE_REGISTRATION_ PLACED	DATE				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
DECISION_MAKER_ FLAG	VARCHAR2				
DECISION_TIMEFRAME_ CODE	VARCHAR2				
DELETED_FLAG	VARCHAR2				
DEPARTMENT	VARCHAR2				
DEPARTMENT_CODE	VARCHAR2				
DESCRIPTION	VARCHAR2				
DESCRIPTION	VARCHAR2				
DO_NOT_EMAIL_FLAG	VARCHAR2				If 'Y' then no emails sent to Contact.
DO_NOT_FAX_FLAG	VARCHAR2				If 'Y' then no fax sent to Contact.
DO_NOT_PHONE_FLAG	VARCHAR2				If 'Y' then no phone calls to Contact.
DUNS_NUMBER	VARCHAR2				
EMAIL_FORMAT	VARCHAR2				
EVALUATED_FLAG	VARCHAR2(1)				
EVENT_OFFER_ID	NUMBER		Yes	AMS_EVENT_ OFFERS_ALL_B	
FA_LOCATION_ID	NUMBER				
FAX_AREA_CODE	VARCHAR2				
FAX_COUNTRY_CODE	VARCHAR2				
FAX_EXTENSION	VARCHAR2				
FAX_NUMBER	VARCHAR2				
FLOOR	VARCHAR2				
GROUP_TYPE	VARCHAR2				
GSA_INDICATOR_FLAG	VARCHAR2				
HOUSE_NUMBER	VARCHAR2				
HQ_BRANCH_IND	NUMBER				
IMPORT_FLAG	NUMBER				
IMPORT_LIST_HEADER_ ID	NUMBER	Yes			Auto Generated

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
IMPORT_SOURCE_LINE_ID	NUMBER	Yes			Auto Generated
IMPORT_SUCCESSFUL_FLAG	VARCHAR2(1)				Populated by the list import program.
INBOUND_CHANNEL_ID	NUMBER				
INBOUND_MEDIA_ID	NUMBER				
INCUMBENT_PARTNER_PARTY_ID	NUMBER				Partner specific
INCUMBENT_PARTNER_RESOURCE_ID	NUMBER				Partner specific
INTEREST_TYPE_ID_1	NUMBER				
INTEREST_TYPE_ID_2	NUMBER				
INTEREST_TYPE_ID_3	NUMBER				
INTEREST_TYPE_ID_4	NUMBER				
INTEREST_TYPE_ID_5	NUMBER				
INVENTORY_ITEM_ID_1	NUMBER				
INVENTORY_ITEM_ID_2	NUMBER				
INVENTORY_ITEM_ID_3	NUMBER				
INVENTORY_ITEM_ID_4	NUMBER				
INVENTORY_ITEM_ID_5	NUMBER				
INVITE_ONLY_OVERRIDE_FLAG	VARCHAR2(1)				
JGZZ_FISCAL_CODE	VARCHAR2				
JOB_TITLE_CODE	VARCHAR2				Stores the job title code
KEEP_FLAG	VARCHAR2				
KNOWN_AS	VARCHAR2				
KNOWN_AS2	VARCHAR2				
KNOWN_AS3	VARCHAR2				
KNOWN_AS4	VARCHAR2				
KNOWN_AS5	VARCHAR2				
LANGUAGE	VARCHAR2				
LANGUAGE_NAME	VARCHAR2				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
LAST_ORDERED_DATE	VARCHAR2				
LAST_REG_STATUS_ DATE	DATE			Date when the registration closed.	
LAST_UPDATE_LOGIN	NUMBER	Yes			Populated by the list import program.
LAST_UPDATED_BY	NUMBER	Yes			Populated by the list import program.
LEAD_NUMBER	VARCHAR2				
LEAD_RANK_ID	NUMBER				Stores the sales lead rank id. Need not supply if supplied will get validated
LOAD_ERROR_MESSAGE	VARCHAR2				Currently, not used. To find the error messages, query from as_lead_ import_errors
LOC_DESCRIPTION	VARCHAR2				
LOC_HIERARCHY_ID	NUMBER				
LOC_VALIDATED_FLAG	VARCHAR2				
LOCATION_DIRECTIONS	VARCHAR2				
LOCATION_ID	NUMBER				Location Id to which address info is mapped
MAIL_STOP	VARCHAR2				
MAILSTOP	VARCHAR2				
MAX_ATTENDEE_ OVERRIDE_FLAG	VARCHAR2(1)				
MIDDLE_INITIAL	VARCHAR2				
MISSION_STATEMENT	VARCHAR2				
NET_WORTH	VARCHAR2				free text format
NEW_CON_FLAG	VARCHAR2				<< DO NOT POPULATE >> if 1 - new contact, 0- existing Contact
NEW_LOC_FLAG	VARCHAR2				<< DO NOT POPULATE >> if 1 - this is a new location. If 0- this is already existing.

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
NEW_PARTY_FLAG	VARCHAR2				<< DO NOT POPULATE >> If 1 - party is newly created. If 0, existing party is used.
NEW_PS_FLAG	VARCHAR2				<< DO NOT POPULATE >> if 1 - new PS, if 0 - PS already existing
NEW_REL_FLAG	VARCHAR2				<< DO NOT POPULATE >> if 1 - new relationship, 0- existing Rel
OBJECT_VERSION_ NUMBER	NUMBER	Yes			Populated by the list import program.
OFFER_ID	NUMBER				
OFFER_ID_1	NUMBER				
OFFER_ID_2	NUMBER				
OFFER_ID_3	NUMBER				
OFFER_ID_4	NUMBER				
OFFER_ID_5	NUMBER				
ORDER_HEADER_ID	NUMBER				
ORDER_LINE_ID	NUMBER				
ORG_CNT_COMMENTS	VARCHAR2				
ORG_CNT_TITLE	VARCHAR2				
ORGANIZATION_ID_1	NUMBER				
ORGANIZATION_ID_2	NUMBER				
ORGANIZATION_ID_3	NUMBER				
ORGANIZATION_ID_4	NUMBER				
ORGANIZATION_ID_5	NUMBER				
ORGANIZATION_ NAME_PHONETIC	VARCHAR2				
ORIG_SYSTEM_CODE	VARCHAR2				Source application code where the lead originated example OTN

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ORIG_SYSTEM_ REFERENCE	VARCHAR2				May be populated as <orig_system_code > <identifier> example OTN10100
ORIGINAL_ REGISTRANT_ CONTACT_ID	NUMBER		Yes		
OWNER_USER_ID	NUMBER		Yes		
PARENT_PROJECT	VARCHAR2				
PARTIES_VALIDATED_ FLAG	VARCHAR2				
PARTY_ID	NUMBER				Party Id to which the customer info is mapped
PARTY_NUMBER	VARCHAR2				
PARTY_REFERENCE_ USE_FLAG	VARCHAR2				
PARTY_SITE_ID	NUMBER				Party Site Id to which the party and location info is mapped
PARTY_SITE_NAME	VARCHAR2				
PARTY_SITE_NUMBER	VARCHAR2				Can be populated ONLY when profile "HZ Generate Party Number" set to 'N'
PARTY_TYPE	VARCHAR2				
PAYMENT_STATUS_ CODE	VARCHAR2(30)				
PERSON_FIRST_NAME_ PHONETIC	VARCHAR2				
PERSON_IDEN_TYPE	VARCHAR2				
PERSON_IDENTIFIER	VARCHAR2				
PERSON_LAST_NAME_ PHONETIC	VARCHAR2				
PERSON_NAME_SUFFIX	VARCHAR2				
PERSON_PREVIOUS_ LAST_NAME	VARCHAR2				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PHONE_CALLING_ CALENDAR	VARCHAR2				
PHONE_COUNTRY_ CODE	VARCHAR2				
PHONE_ID	NUMBER				DO NOT POPULATE
PO_BOX_NUMBER	VARCHAR2				
LOCATION_POSITION					
POSTAL_PLUS4_CODE	VARCHAR2				
PRIMARY_CONTACT_ FLAG	VARCHAR2				
PRIMARY_CONTACT_ PER_ROLE_TYPE	VARCHAR2				'Y' or 'N'
PRIMARY_INTEREST_ CODE_ID_1	NUMBER				
PRIMARY_INTEREST_ CODE_ID_2	NUMBER				
PRIMARY_INTEREST_ CODE_ID_3	NUMBER				
PRIMARY_INTEREST_ CODE_ID_4	NUMBER				
PRIMARY_INTEREST_ CODE_ID_5	NUMBER				
PRIMARY_PER_TYPE	VARCHAR2				'Y' or 'N'
PRM_ASSIGNMENT_ TYPE	VARCHAR2				
PRM_EXEC_SPONSOR_ FLAG	VARCHAR2				Partner specific
PRM_IND_ CLASSIFICATION_CODE	VARCHAR2				Partner specific
PRM_PRJ_LEAD_IN_ PLACE_FLAG	VARCHAR2				Partner specific
PRM_SALES_LEAD_TYPE	VARCHAR2				Partner specific
PROGRAM_ APPLICATION_ID	NUMBER				
PROGRAM_ APPLICATION_ID	NUMBER				] DO NOT POPULATE
PROGRAM_ID	NUMBER				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PROGRAM_ID					] Concurrent process generated
PROGRAM_UPDATE_ DATE	DATE				
PROGRAM_UPDATE_ DATE	DATE				]
PROMOTION_CODE	VARCHAR2				If given and promotion_id is not provided, then this will be transferred to promotion_id.
PROMOTION_ID	NUMBER				If given, this is used for creating the sales lead header.
PROSPECT_FLAG	VARCHAR2(1)				
PS_USES_COMMENTS	VARCHAR2				
QUALIFIED_FLAG	VARCHAR2				
QUANTITY_1	NUMBER				
QUANTITY_2	NUMBER				
QUANTITY_3	NUMBER				
QUANTITY_4	NUMBER				
QUANTITY_5	NUMBER				
RANK	VARCHAR2				
RAW_PHONE_NUMBER	VARCHAR2				
REG_SOURCE_TYPE_ CODE	VARCHAR2(30)			AMS_EVENT_REG_ SOURCE_TYPE LOOKUP	
REGISTRANT_ ACCOUNT_ID	NUMBER		Yes	CUSTOMER_ ACCOUNT_ID	
REGISTRANT_ CONTACT_ID	NUMBER		Yes	CONTACT_ID	
REGISTRANT_PARTY_ID	NUMBER		Yes	PARTY_ID	
REGISTRATION_GROUP_ ID	NUMBER		Yes		
REGISTRATION_ SOURCE_ID	NUMBER				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
REJECT_REASON_CODE	VARCHAR2				
REL_PARTY_ID	NUMBER				Relationship's party ID to which the relationship is mapped.
REQUEST_ID	NUMBER				
REQUEST_ID	NUMBER				]
ROLE_LEVEL	VARCHAR2				
SALES_LEAD_ID	NUMBER				<< DO NOT POPULATE >> Sales Lead ID to which the sales lead info is mapped.
SALES_TAX_GEOCODE	VARCHAR2				
SALES_TAX_INSIDE_CITY_LIMITS	VARCHAR2				
SALESREP_ID	NUMBER				
SCORECARD_ID	NUMBER				
SECONDARY_INTEREST_CODE_ID_1	NUMBER				
SECONDARY_INTEREST_CODE_ID_2	NUMBER				
SECONDARY_INTEREST_CODE_ID_3	NUMBER				
SECONDARY_INTEREST_CODE_ID_4	NUMBER				
SECONDARY_INTEREST_CODE_ID_5	NUMBER				
SECURITY_GROUP_ID	NUMBER				
SECURITY_GROUP_ID	NUMBER				
SHORT_DESCRIPTION	VARCHAR2				
SIC_CODE_TYPE	VARCHAR2				
SITE_USE_TYPE	VARCHAR2				This is a mandatory column for HZ_PARTY_SITE_USES. But if not given, it will be defaulted to 'BILL_TO'

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
SOURCE_CODE	VARCHAR2(30)		Yes	AMS_EVENT_ OFFERS_ALL_B	
SOURCE_PROMOTION_ ID_1	NUMBER				
SOURCE_PROMOTION_ ID_2	NUMBER				
SOURCE_PROMOTION_ ID_3	NUMBER				
SOURCE_PROMOTION_ ID_4	NUMBER				
SOURCE_PROMOTION_ ID_5	NUMBER				
STREET	VARCHAR2				
STREET_NUMBER	VARCHAR2				
STREET_SUFFIX	VARCHAR2				
SUITE	VARCHAR2				
SYSTEM_STATUS_CODE	VARCHAR2(30)			AMS_EVENT_REG_ STATUS LOOKUP	
TARGET_LIST_ID	NUMBER				
TAX_NAME	VARCHAR2				
TIME_ZONE	VARCHAR2				
TOTAL_NUM_OF_ ORDERS	NUMBER				
TOTAL_ORDERED_ AMOUNT	NUMBER				
UOM_CODE_1	NUMBER				
UOM_CODE_2	NUMBER				
UOM_CODE_3	NUMBER				
UOM_CODE_4	NUMBER				
UOM_CODE_5	NUMBER				
URGENT_FLAG	VARCHAR2				
USER_STATUS_ID	NUMBER		Yes	AMS_USER_STATUS LOOKUP	
VEHICLE_RESPONSE_ CODE	VARCHAR2				

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
WAITLISTED_PRIORITY	VARCHAR2(30)				

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How Existence Checking in OMO is Supported

How Existence Checking in OMO is Supported

Existence Checking is done by using fuzzy keys and Word Replacement Rules. Refer to the TCA documentation for more information on fuzzy keys and word replacement rules.

List import program use the following algorithm to create any TCA entity

If Locations not exists then create Location. If Party not exists then create Party. If Part Site not exists for combination of above Party and Location then create Party Site. If Contact Party not exists then create Contact party. If Relationship of type CONTACT not exists between Party and Contact Party then create Org Contact, Relationship and Contact Roles. If Contact Points do not exist then create Contact Points.

Customer

Existence checking is done using customer_key in HZ_PARTIES. This key is generated by TCA APIs while creating the customer. List Import program populate the AMS_IMP_SOURCE_LINES table with dedupe keys for all records to be imported. If it finds a match on the HZ_PARTIES then it uses the matching customer otherwise it creates a new customer using TCA API. As mentioned above if there are multiple records with the same customer key then the import record is created for the customer having highest party_id.

Any word replacement rules are defined in TCA then those rules will be applied to the customer name in the table while populating the key in AMS_IMP_SOURCE_LINES table.

Address

In the TCA customer model, the address consists of the party site in HZ_PARTY_SITES and location in HZ_LOCATIONS. Locations is a physical address, such as 500 Oracle Parkway, Redwood Shores, CA 94065. The Party Site is a logical name associated with a location. For example, the Party Site - "Head Quarters" can be associated with a location 500 Oracle Parkway. Multiple party sites can point to the same location. For example, 500 Oracle Parkway can be both "Head Quarters" and "Human Resources". The list import program check whether the location exists in HZ_LOCATIONS or not as well as whether the party site for the combination of location and customer exists in HZ_PARTY_SITES.

If a matching record is found in HZ_LOCATIONS then it uses the matching location otherwise it creates a new location using TCA API. As mentioned above if there are multiple records with the same address key then it takes the location having highest location_id.

Once the location_id is created, the program finds out whether a party site exists for the combination of this location_id and party_id. If such party site already exists then it takes that party_site_id. If not then a new party site is created using TCA API.

Contact

In TCA, the contact is stored as a party of type "PERSON" in HZ_PARTIES and a relationship is created between the customer and contact in HZ_RELATIONSHIPS. The list import program checks whether the contact exists in HZ_PARTIES (as a party of type “PERSON") as well as it checks whether a relationship of type "Contact" exists between the customer and contact in HZ_RELATIONSHIPS. The existence checking is done using customer_key in TCA table (HZ_PARTIES). Refer to the above section on customer.

Note that if relationship of any other type exists then List import program will create a new relationship. If a contact with same first name and last name (thus same party_name in HZ_PARTIES) exists in table then list Import will not create a new contact in TCA tables. It will just create a new relationship if one does not exists and attach the list to that contact.

Contact Points

List import creates Phone, Email, WEB, and Fax. No existence checking is done here.

I

Integrating Marketing Web Execution with other Applications

Web Execution can be Implemented by other Applications

Web Execution may be implemented by other application through JSP pages or through HTML Pages. Here is an example, followed by some preliminary steps which are common to implementation by either method.

Example

For example, suppose a campaign schedule is to be displayed on the Home page

- Site = 'MYSITE'
- Page = 'HOME'
- Location(s) = TOP_CENTER and UPPER_RIGHT.

Preliminary Steps

1. Define a Site in the Site definition screen (OMOlogin > Administration > Marketing > Execution > Sites) with a Programmatic Access Name for the site. In our example, the Programmatic Access Name for the site is 'MYSITE'.
2. Define a Page for the above defined Site in the Page definition screen (OMOlogin > Administration > Marketing > Execution > Pages) with a Programmatic Access Name for the page. In our example, the Programmatic Access Name for the page is 'HOME'.
3. Create two new locations with location codes 'TOP_CENTER' and 'UPPER_RIGHT' in LOV lookups. These location codes are specified during the Implementing Web Placement section.
4. Define posting (OMOlogin > Execution > Web Postings).

5. Define a Placement in the Placement definition screen (OMOlogin > Execution > Web Placements).

Web Execution Implementation through JSP Pages

In order to implement Web Execution through jsp pages, follow steps below.

> **Note:** The jsp scope should always be 'REQUEST' scope, otherwise the recommendation will not be displayed.

1. Set site and page attributes
   a. These should be set at the top of the User Application jsp.
   b. Set 'site' and 'page' attributes of page context with the corresponding programmatic access names
   c. In our scenario, following would be code snippet for this step

```
-------------------------------------------
<%
pageContext.setAttribute("site", "MYSITE", PageContext.REQUEST_SCOPE);
pageContext.setAttribute("page", "HOME", PageContext.REQUEST_SCOPE);
%>
-------------------------------------------
```

2. Set location and include amsWebPlacement.jsp where the recommendation is intended to be displayed. Repeat this step at every location where you want the recommendation to appear.
   a. Set Location attributes of page context.
   b. Include file amsWebPlacement.jsp
   c. In our scenario, following would be code snippets for this step

```
-------------------------------------------
pageContext.setAttribute("location", "TOP_RIGHT", PageContext.REQUEST_SCOPE);
<jspinclude page="amsWebPlacement.jsp" flush="true" />
-------------------------------------------
-------------------------------------------
pageContext.setAttribute("location", "UPPER_RIGHT", PageContext.REQUEST_SCOPE);
<jspinclude page="amsWebPlacement.jsp" flush="true" />
-------------------------------------------
```

Note: This amsWebPlacement.jsp will ultimately display a HTML code.

Notes

- Above Step 1 should be done only once in a jsp.
- Above Step 2 should be repeated at every location where you intend to see a recommendation.
- Following are the seeded locations. New locations can be created in Location Lookup Types screen.
  - LEFT1, LEFT2, LEFT3, LEFT4, LEFT5, LEFT6, LEFT7
  - RIGHT1, RIGHT2, RIGHT3, RIGHT4, RIGHT5, RIGHT6, RIGHT7
  - TOP, BOTTOM

Web Execution Implementation through HTML Pages

Web Execution can be implemented for HTML applications as well. For this method of implementation, a URL should be invoked with all required name-value parameters. This URL could be invoked through a javascript from a HTML page. The invoked URL will get back the recommendations.

Follow these steps to form the URL to be invoked.

1. http//<server name><port number>/OA_HTML/amsWebPlacementLink.jsp?site=<Defined Programmatic Access Name of Site>&page=<Defined Programmatic Access Name of Page>&location=<Location code defined in location lookups>

Note: The jsp to be used for HTML Applications is amsWebPlacementLink.jsp.

---

2. The API that could be embedded in the HTML code would look something like following

```
-------------------------------------------
<!-- BEGIN Web Placements Tag -->
<script language="JavaScript"
src="http//www.mysite.com:8000/OA_
HTML/amsWebPlacementLink.jsp?site=MYSITE&page=HOME&location=TOP_CENTER">
</script>
<noscript>
</noscript>
<!-- END Web Placements Tag -->
-------------------------------------------
```

J

Implementing a Custom Strategy and Custom Condition for Web Execution

Implementing a Custom Strategy

To define a Custom Strategy, you have first write a Java class that implements the interface '*Fireable*'. Two sample Custom Strategy Java Classes called "oracle.apps.ams.execution.SampleCustomProdSelector" and "oracle.apps.ams.execution.SampleCustomSchedSelector" are shipped with source code as an example.

A typical Java class may look like as follows

```
/*Sample Java class of Custom Strategy selecting a list of
Products.
*/

package oracle.apps.ams.content;

/* JDK */
import java.sql.SQLException;
import java.math.BigDecimal;

/* JDBC */
import oracle.jdbc.driver.OracleConnection;
import java.sql.Connection;
import java.sql.ResultSet;
import java.sql.PreparedStatement;
import oracle.jdbc.driver.OracleCallableStatement;
import oracle.jdbc.driver.OracleTypes;
import oracle.sql.ARRAY;
```

```
/* JTF */
import oracle.apps.fnd.common.VersionInfo;
import oracle.apps.jtf.aom.transaction.TransactionScope;
import oracle.apps.jtf.util.GeneralUtil;

/* OMO */
import oracle.apps.ams.execution.Fireable;
import oracle.apps.ams.execution.ExecutionContext;
import oracle.apps.ams.execution.RuntimeAppCtx;
import oracle.apps.ams.posting.strategy.StrategyUtil;
import oracle.apps.ams.common.PostingSQLUtil;
import oracle.apps.ams.common.ContentCollector;
import oracle.apps.ams.common.FastVector;
import oracle.apps.ams.common.AMSLogger;

/* OSO */
import oracle.apps.asf.util.OSOException;


/**
 ** The sample Custom Strategy class
*/

public class SampleCustomProdSelector implements Fireable
{
  public static final String RCS_ID = "$Header: SampleCustomProdSelector.java
    115.2 2002/01/10 23:38:07 asaha noship $" ;
  public static final boolean RCS_ID_RECORDED =
    VersionInfo.recordClassVersion(RCS_ID, "oracle.apps.ams.content");
  public static final String _THISCLASS = "SampleCustomProdSelector";


  /**
   * Tries to find the Products that have been added within last 30 days from
   * sysdate. So, if you added 3 such Products and max allowed is 2, 2 of them
   * will be returned.
   */

  public void fire(  ExecutionContext p_objContext //the runtime Context
                   , String p_strContentType  //the Content Type to be returned
                     - 'Product' in this case
                   , ContentCollector p_ccContentIds //returned Product Ids
                   , FastVector p_fvParamNames  //strat param names - not
                     required for Sample strategy
                   , FastVector p_fvParamValues //strat param values - not
```

```
                  required for Sample strategy
                , String p_strBusPrior //Business Priority to sort output by
                  - not used in this example
                , String p_strBusPriorOrder //Priority Order of sorting -
                  ASC or DESC
                , FastVector p_fvFilters //Filters to apply if any - not
                  meaningful in this example
                , int p_intMaxAllowed  //max returnable from this Strategy
               )
    throws SQLException, OSOException, Exception
  {
    String l_strMethodName = "fire";

    //log the Entry into this method
    AMSLogger.log(_THISCLASS
               , l_strMethodName
               , "Enter"
               , AMSLogger.DEBUG
               );

    //get the Runtime Application Context
    RuntimeAppCtx re = p_objContext.m_objRuntimeAppCtx;

    //declare the variables
    Connection conn = null;
    PreparedStatement pstmt = null;
    ResultSet rs = null;
    String  xret;
    int xmsgCnt;
    String xmsgData = "";

    BigDecimal tempbd;
    String temp;

    try
    {
      //first get a Database Connection
      conn =
(oracle.jdbc.driver.OracleConnection)TransactionScope.getConnection();

      //then prepare the query
      StringBuffer sb = new StringBuffer();
      sb.append(" select inventory_item_id");
      sb.append(" from mtl_system_items_kfv");
      sb.append(" where organization_id = ?");
```

```
    sb.append(" and NVL(start_date_active, sysdate) >= sysdate-30");
    sb.append(" and NVL(end_date_active, sysdate) >= sysdate");
    sb.append(" and web_status = 'PUBLISHED'");
    sb.append(" and rownum <= ?");

    //get the prepared statement from the connection object
    pstmt = conn.prepareCall( sb.toString());

    //orgId is required for all Product recommendations - so should
    //get it from the Runtime Execution Context
    tempbd = re.getItemValidationOrgId();
    //log it to outout log file
    AMSLogger.log(_THISCLASS
                  , l_strMethodName
                  , "Org Id : "+tempbd
                  ,  AMSLogger.DEBUG);
    //set orgid in prepared statement
    if(tempbd == null)
      pstmt.setNull(1, java.sql.Types.NUMERIC);
    else
      pstmt.setInt(1, tempbd.intValue());

    //set max count in prepared statement
    pstmt.setInt(2, p_intMaxAllowed);

    //get the output result set
    rs = pstmt.executeQuery();

    //iterate through the result set
    while(rs.next())
    {
      temp = rs.getString(1);
      p_ccContentIds.addContent(new BigDecimal(temp));
    }
  }
  finally
  {
    try
    {
      if(pstmt != null)
      {
        //close all prepared statements otherwise memory leaks will occur
        pstmt.close();
        pstmt = null;
      }
```

```
        if(rs != null)
        {
          //close all resulesets otherwise memory leaks will occur
          rs.close();
          rs = null;
        }
        if(conn != null)
          TransactionScope.releaseConnection( conn );
      }
      catch(Exception e)
      {
      }
    }
    //log the Exit from this method
    AMSLogger.log(_THISCLASS
                  , l_strMethodName
                  , "Exit"
                  , AMSLogger.DEBUG);
  }


  /**
   * @return Strategy Type
   */
  public String getStrategyType()
  {
    //return this String as defined in the interface Fireable
    return CUSTOM_STRATEGY_TYPE;
  }

}
```

The above class recommends Products that have been added with active start date within last month. Once you write your own Java class, register it under Administration > Strategy. You have to know for what Content Type you are defining your Custom Strategy. Once your Custom Java Class is registered under a name, it can be used in Universal or Rule Based Postings if Strategy Types are “Custom”.

Implementing a Custom Condition

To use the extended ruleconditions, you have first write a Java class that implements the interface '*CustomCondition*'. The following sample class is shipped with the product. This class show how to get the information about the city of the current user.

This class needs to be registered in the system as a "site" level profile value. The name of the profile is AMS: Custom Condition Class.

```
package oracle.apps.ams.execution;

/* JTF*/
import oracle.apps.fnd.common.VersionInfo;
import oracle.apps.jtf.aom.transaction.TransactionScope;

/* JDBC */
import oracle.jdbc.driver.OracleConnection;
import java.sql.Connection;
import java.sql.ResultSet;
import java.sql.PreparedStatement;
import oracle.jdbc.driver.*;
import oracle.sql.*;

/* OMO */
import oracle.apps.ams.common.AMSLogger;

/**
 * Should implement CustomCondition.
 */
public class SampleCustomCondition implements CustomCondition
{
  public static final boolean RCS_ID_RECORDED =
  VersionInfo.recordClassVersion(RCS_ID, "oracle.apps.ams.execution");
 public static final String _THISCLASS =
"oracle.apps.ams.execution.SampleCustomCondition";

/*
 This example method returns the city in which
 the user resides. For instance, this could be used
 with the extended conditions to check if the user
 is a resident of say, San Francisco.
*/

 public String[] getValues(ExecutionContext p_objContext)
```

```
{
  String l_strMethodName = "getValues";

  //log the Entry into this method
  AMSLogger.log(_THISCLASS
        , l_strMethodName
        , "Enter"
        , AMSLogger.DEBUG
);

 //get the Runtime Application Context
 // this is a required step.
 RuntimeAppCtx re = p_objContext.m_objRuntimeAppCtx;

 //declare the variables
 // to connect to the database to get user information.

 Connection conn = null;
 PreparedStatement pstmt = null;
 ResultSet rs = null;
 String[] values = new String[5];

 try
 {
  //first get a Database Connection
  conn = (oracle.jdbc.driver.OracleConnection)TransactionScope.getConnection();

  //then prepare the query
  StringBuffer sb = new StringBuffer();

  //Query
  // User information is stored in hz_parties table/view

  sb.append("select city from hz_parties");
  sb.append(" where party_id = ?");

  //get the prepared statement from the connection object
  pstmt = conn.prepareCall( sb.toString());

  // re.getPartyId() returns the party id of the user.
  pstmt.setBigDecimal(1, re.getPartyId());

  // execute the query
  rs = pstmt.executeQuery();
```

```
        if(rs.next())
        {
         values[0] = rs.getString("city");
        }
        else
        {
         values[0] = "";
        }

        //log the Exit from this method
        AMSLogger.log(_THISCLASS
               , l_strMethodName
               , "Exit"
               , AMSLogger.DEBUG);

        return values;
       }
       catch(Exception e)
       {
        // In case of an exception log the exception
        // to see what went wrong
        AMSLogger.log(_THISCLASS
               , l_strMethodName
               , AMSLogger.ERROR
               , e
               );
     }
       finally
       {
        try
        {
         if(pstmt != null)
         {
          //close all prepared statements to avoid memory leaks
          pstmt.close();
          pstmt = null;
         }
         if(rs != null)
         {
          //close all resultsets to avoid memory leaks
          rs.close();
          rs = null;
         }
         if(conn != null)
          TransactionScope.releaseConnection( conn );
```

```
    }
    catch(Exception e)
    {
    }
  }
  //log the Exit from this method
  AMSLogger.log(_THISCLASS
         , l_strMethodName
         , "Exit"
         , AMSLogger.DEBUG);
   return null;

  }

}
```

This class returns the "city" of the current user as the first value of an array of 5 strings. For this to work, you have to register information about this value under Administration > Marketing > Execution > Conditions as a value of type "STRING".

K

Seeded Metrics

Seeded Metrics

The following metrics are seeded in the Oracle Marketing Online application

Metric Id	Metric Name	Object	Calculation Type	Metric Parent Id	Summary Metric Id
1	Total Cost - Campaign	Any	Summary		
2	Total Direct Cost - Campaign	Any	Summary		1
3	Deliverable Cost - Campaign	Any	Rollup	58	2
4	Event Cost - Campaign	Any	Rollup	59	2
5	Rolled-up Cost - Campaign	Any	Rollup	60	2
6	Total Indirect Cost - Campaign	Any	Rollup	61	1
7	Total Revenue - Campaign	Any	Summary		
8	Rolled-up Revenue - Campaign	Any	Rollup	63	7
9	Total Response - Campaign	Any	Summary		
10	Campaign Response	Campaign	Manual	65	9
11	Rolled-up Response - Campaign	Any	Rollup	65	9

Metric Id	Metric Name	Object	Calculation Type	Metric Parent Id	Summary Metric Id
12	Total Cost - Campaign Schedule	Any	Summary		
13	Total Direct Cost - Campaign Schedule	Any	Summary		12
14	Deliverable Cost - Campaign Schedule	Any	Rollup	58	13
15	Event Cost - Campaign Schedule	Any	Rollup	59	13
16	Direct Cost	Campaign Schedule	Manual	60	13
17	Total Indirect Cost - Campaign Schedule	Any	Rollup	61	12
18	Total Revenue - Campaign Schedule	Any	Summary		
19	Revenue	Campaign Schedule	Manual	63	18
20	Total Response - Campaign Schedule	Any	Summary		
21	Response	Campaign Schedule	Manual	65	20
22	Total Cost - Event	Any	Summary		
23	Total Direct Cost - Event	Any	Summary		22
24	Deliverable Cost - Event	Any	Rollup	58	22
25	Campaign Cost - Event	Any	Rollup	59	23
26	Rolled-up Cost - Event	Any	Rollup	60	23
27	Total Indirect Cost - Event	Any	Rollup	61	22
28	Total Revenue - Event	Any	Summary		
29	Rolled-up Revenue - Event	Any	Rollup	63	28
30	Total Response - Event	Any	Summary		
31	Event Response	Any	Rollup	65	30
32	Rolled-up Response - Event	Any	Rollup	65	30

Metric Id	Metric Name	Object	Calculation Type	Metric Parent Id	Summary Metric Id
33	Total Cost - Event Schedule	Any	Summary		
34	Total Direct Cost - Event Schedule	Any	Summary		33
35	Deliverable Cost - Event Schedule	Any	Rollup	58	34
36	Campaign Cost - Event Schedule	Any	Rollup	59	34
37	Direct Cost	Event Schedule	Manual	60	34
38	Total Indirect Cost - Event Schedule	Any	Rollup	61	33
39	Total Revenue - Event Schedule	Any	Summary		
40	Revenue	Event Schedule	Manual	63	39
41	Total Response - Event Schedule	Any	Summary		
42	Response	Event Schedule	Manual	65	41
43	Total Cost - Deliverable	Any	Summary		
44	Total Direct Cost - Deliverable	Any	Summary		43
45	Creative Cost	Deliverable	Manual	58	44
46	Other Cost	Deliverable	Manual	58	44
47	Postage Cost	Deliverable	Manual	58	44
48	Total Indirect Cost - Deliverable	Any	Rollup	61	43
49	Total Revenue - Deliverable	Any	Summary		
50	Revenue	Deliverable	Manual	63	49
51	Total Response - Deliverable	Any	Summary		
52	Response	Deliverable	Manual	65	51
53	Other Cost	Campaign	Manual	60	2
54	Other Cost	Event	Manual	60	23

Metric Id	Metric Name	Object	Calculation Type	Metric Parent Id	Summary Metric Id
55	Allocation	Campaign	Allocation		
56	Total Cost	Any	Summary		
57	Total Direct Cost	Any	Summary		56
58	Deliverable Cost - Program	Any	Rollup	58	57
59	Event Cost - Program	Any	Rollup	59	57
60	Rolled-up Cost - Program	Any	Rollup	60	57
61	Total Indirect Cost - Program	Any	Rollup	61	56
62	Total Revenue	Any	Summary		
63	Rolled-up Revenue - Program	Any	Rollup	63	62
64	Total Response	Any	Summary		
65	Rolled-up Response - Program	Any	Rollup	65	64
66	Campaign Response	Program	Manual	65	64
67	Other Cost	Program	Manual	60	57
68	Allocation	Program	Allocation		
69	Total Cost - One-Off Event	Any	Summary		
70	Total Direct Cost - One-Off Event	Any	Summary		69
71	Deliverable Cost - One-Off Event	Any	Rollup	58	70
72	Campaign Cost - One-Off Event	Any	Rollup	60	70
73	Direct Cost	One Off Event	Manual	60	70
74	Total Indirect Cost - One-Off Event	Any	Rollup	61	69
75	Total Revenue - One-Off Event	Any	Summary		
76	Revenue	One Off Event	Manual	63	69

Metric Id	Metric Name	Object	Calculation Type	Metric Parent Id	Summary Metric Id
77	Total Response - One-Off Event	Any	Summary		
78	Response	One Off Event	Manual	65	77
81	Total Leads	Any	Summary		
82	Campaign Schedule Leads	Any	Rollup	82	81
83	Campaign Schedule Leads	Campaign Schedule	Function	82	81
84	Event Schedule Leads	Event Schedule	Function	86	81
85	One-Off Event Leads	One Off Event	Function	87	81
86	Event Schedule Leads	Any	Rollup	86	81
87	One-Off Event Leads	Any	Rollup	87	81
91	Total Opportunities	Any	Summary		
92	Campaign Schedule Opportunities	Any	Rollup	92	91
93	Campaign Schedule Opportunities	Campaign Schedule	Function	92	91
94	Event Schedule Opportunities	Event Schedule	Function	96	91
95	One-Off Event Opportunities	One Off Event	Function	97	91
96	Event Schedule Opportunities	Any	Rollup	96	91
97	One-Off Event Opportunities	Any	Rollup	97	91
101	Total Orders Amount	Any	Summary		
102	Campaign Schedule Orders Amount	Any	Rollup	102	101
103	Event Schedule Orders Amount	Event Schedule	Function	106	101
104	One-Off Event Orders Amount	One Off Event	Function	107	101
105	Campaign Schedule Orders Amount	Campaign Schedule	Function	102	101

Metric Id	Metric Name	Object	Calculation Type	Metric Parent Id	Summary Metric Id
106	Event Schedule Orders Amount	Any	Rollup	106	101
107	One-Off Event Orders Amount	Any	Rollup	107	101
121	Total Registrants	Any	Summary		
122	Event Schedule Registrants	Any	Rollup	122	121
123	Event Schedule Registrants	Event Schedule	Function	122	121
124	One-Off Event Registrants	One Off Event	Function	125	121
125	One-Off Event Registrants	Any	Rollup	125	121
131	Total Attendees	Any	Summary		
132	Event Schedule Attendees	Any	Rollup	132	131
133	Event Schedule Attendees	Event Schedule	Function	132	131
134	One-Off Event Attendees	One Off Event	Function	135	131
135	One-Off Event Attendees	Any	Rollup	135	131
141	Total Cancellations	Any	Summary		
142	Event Schedule Cancellations	Any	Rollup	142	141
143	Event Schedule Cancellations	Event Schedule	Function	142	141
144	One-Off Event Cancellations	One Off Event	Function	145	141
145	One-Off Event Cancellations	Any	Rollup	145	141

L

Discoverer Setup

Discoverer Setup

Discoverer EUL Creation

Use the following command line to create a 4i EUL. This takes care of the create database user and the necessary APPS grants all in one step. The language of the EUL must be set for all APPS EUL's!

Open a DOS window, go to the directory where your Discoverer Admin edition is installed (example) d\orant\discvr4 and run

```
dis4adm.exe
     /CREATE_EUL
     /APPS_MODE
     /CONNECT system/manager@tst115rw
     /USER eul4_us
     /PASSWORD eul
     /DEFAULT_TABLESPACE user_data
     /TEMPORARY_TABLESPACE temp
     /SET_EUL_LANGUAGE US
     /APPS_GRANT_DETAILS apps/apps
     /SHOW_PROGRESS
```

If the schema has been created already you can also use

```
dis4adm.exe
     /CREATE_EUL
     /APPS_MODE
     /CONNECT eul4_us/eul@tst115rw
     /SET_EUL_LANGUAGE US
     /APPS_GRANT_DETAILS apps/apps
     /SHOW_PROGRESS
```

Discoverer EUL Import

A customer will import the eex files into the EUL using ad utility adupdeul, a shell script running on the NT box where Discoverer Admin is installed.

Prerequisites

MKS Toolkit is required to run the shell script on NT. The utility is available on any Discoverer 4.1.36 or above version.

Steps

1. Start the Korn Shell (MKS Toolkit)
2. From the NT box where Discoverer Admin is installed map the $AU_ TOP/discover directory or copy the eex files to the NT box and specify this directory as 'topdir' directory when running the utility
3. APPS User/Responsibility must be specified for import. The imported workbooks will be saved under the specified APPS User.
4. On the new EUL make sure the APPS User does have full access privileges to use Discoverer Admin Edition.
5. Use the parameter file so that you don't have to specify all values on the command line.

Usage

```
sh adupdeul.sh
             connect=<username/password{@<two_task>}
                resp=<APPS responsibility name>
              gwyuid=<APPS GWYUID>
              fndnam=<APPS FNDNAM>
            secgroup=<APPS responsibilty security group>
              topdir=<top level directory where discoverer
                                      files are available>
           eulprefix=<EUL prefix (for ex EUL4 for EUL4_US)>
            language=<NLS language code>
             eultype=<OLTP|EDW>                  default OLTP
         {   parfile=<name of parameter file>             }
         {      mode=<COMPLETE or DRIVER> default DRIVER> }
         {    driver=<list of driver files to be loaded
                    separated by a "," (comma)> }
         {   exedir=<directory where discoverer executables are
                   located> }
         {   logfile=<log file name, default adupdeul.log> }
```

Example

1. Copy the directory $AU_TOP/discover/US to C\bblock\import\au_top\discover\US
2. With Admin Edition connect as EUL owner EUL4_US/EUL@mydb and grant privileges for Admin Edition to apps user SYSTEST
3. In Korn Shell CD C\bblock\import
4. Specify parameter values in a parameter file, for example

```
parfile.lst
eulprefix=EUL4
exedir=D/orant/discvr4
mode=COMPLETE
topdir=C/bblock/import/au_top/discover
eultype=OLTP
fndnam=APPS
gwyuid=APPLSYSPUB/PUB
resp="Business Views Setup"
secgroup="Standard"
```

5. Start the full import, all eex files in the topdir

```
sh adupdeul.sh
connect    = systest/welcome98@mydb
parfile   = parfile.lst
language  = US
logfile   = imp_010314_EUL4_US_mydb.log
```

   Or start the import for just the files of specified ARU copy file drivers

```
sh adupdeul.sh
connect    = systest/welcome98@mydb
parfile   = parfile.lst
language  = US
mode      = DRIVER
driver    = c1641981.drv
logfile   = imp_010314_EUL4_US_mydb.log
```

6. For the first time to import, we suggest you to use mode=COMPLETE

ICX Profile Settings

Set the following ICX profiles in Oracle Applications at the responsibility level

ICX_ PROFILE ICX_DISCOVERER_LAUNCHER

URL that points to the Web Discoverer Server

Example

http//machinename.domain/diswb4/html/discolaunch.htm?Connect=[APPS _SECURE]

ICX_ PROFILE ICX_DISCOVERER_VIEWER_LAUNCHER

URL that points to the Discoverer Viewer

Example

http//machinename.domain/discoverer4i/viewer?cs=[APPS_SECURE]

ICX_PROFILE ICX_DEFAULT_EUL

This in combination with the language code make up the EUL owner at runtime.

Example EUL4 (not EUL4_US)

M

Marketing Source Codes

Marketing Source Codes

Source codes are unique identifiers for the following marketing objects campaigns, campaign schedules, events, event schedules, and offers. Source codes play a very important role in marketing. The customer, most often, interacts with the CRM application, such as telesales, istore, using a source code. Source codes are stored with orders to track the effectiveness of an event, campaign or offer.

Source Code Schema

Each marketing object has a column referencing the source code. This source code is unique throughout the application. Given a source code, it can be traced back to its marketing object by looking at the AMS_SOURCE_CODES table. The following table shows source code references

Table	Object ID Fields	Source Code fields
AMS_CAMPAIGNS_VL	CAMPAIGN_ID	source_code
AMS_CAMPAIGN_ SCHEDULES_VL	SCHEDULE_ID	source_code
AMS_EVENT_HEADERS_VL	EVENT_HEADER_ID	source_code
AMS_EVENT_OFFERS_VL	EVENT_OFFER_ID	source_code
AMS_OFFERS_VL	OFFER_ID QP_LIST_HEADER_ID	offer_code

Table	Object ID Fields	Source Code fields
AMS_SOURCE_CODES	SOURCE_CODE_ID	source_code arc_source_code_for source_code_for_id related_source_code related_source_object related_source_id

The Table definition for the AMS_SOURCE_CODE table is:

Column Name	Field Type	Description
SOURCE_CODE_ID	NUMBER	Unique identifier for the source code table
SOURCE_CODE	VARCHAR2(30)	Unique identifier for all the marketing objects. Source codes are communicated to the customers.
SOURCE_CODE_FOR_ID	NUMBER	FK to the marketing object to which the source code points to.
ARC_SOURCE_CODE_FOR	VARCHAR2(30)	Four letter code that points to a marketing object (EVEH = Event headers, EVEO = Event schedules, EONE = One-Off Events, CAMP = Campaigns, CSCH = Campaign Schedules, OFFR = Offers)
ACTIVE_FLAG	VARCHAR2(1)	Flag to indicate if the source code is active or not.
RELATED_SOURCE_CODE	VARCHAR2(30)	Source code of the related object. This is used in case of event promotions. The customer is interested in the related event that the campaign is promoting rather than the campaign itself.
RELATED_SOURCE_OBJECT	VARCHAR2(30)	Four letter code that points to the related marketing object (EVEH = Event headers, EVEO = Event schedules, CAMP = Campaigns, CSCH = Campaign Schedules, OFFR = Offers)

Column Name	Field Type	Description
RELATED_SOURCE_ID	NUMBER	FK to the marketing object to which the related source code points to.

Source Code Construction

Source codes are constructed various components. The maximum number of characters in a source code is 30 characters. It will be composed of any or all of the following. The Geography Code comes from the geographic area code entered into geography. The Suffix comes from the source code suffix field in Custom Setups.

- Geography Code
- Month Code
- Activity Code
- Source Code digits (maximum number equals 30 - total of other components)
- Suffix

N

Seeded User Statuses

User Statuses can be created across the application for a combination of Activity and Status. The Application is seeded with the following User Statuses. These user statuses can be modified or extended to meet the organization's Business Rules.

The seeded User Status values are as follows:

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Budget Sourcing Status	APPROVED	Approved	Approved
Budget Sourcing Status	CLOSED	Closed	Accounting Closed
Budget Sourcing Status	NEW	Planning	Planning
Budget Sourcing Status	PENDING	Pending	Pending Approval
Budget Sourcing Status	REJECTED	Rejected	Rejected by Approver
Budget Status	ACTIVE	Active	Active
Budget Status	ARCHIVED	Archived	Archived
Budget Status	CANCELLED	Cancelled	Cancelled
Budget Status	CLOSED	Closed	Closed
Budget Status	DRAFT	Draft	Draft
Budget Status	ON_HOLD	On Hold	On Hold
Budget Status	PENDING	Pending Approval	Pending Approval
Budget Status	REJECTED	Rejected	Rejected
Campaign Schedule Status	ACTIVE	Active	Active
Campaign Schedule Status	ARCHIVED	Archived	Archived
Campaign Schedule Status	AVAILABLE	Available	Available
Campaign Schedule Status	CANCELLED	Cancelled	Cancelled
Campaign Schedule Status	CLOSED	Closed	Closed

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Campaign Schedule Status	COMPLETED	Completed	Completed
Campaign Schedule Status	DENIED_BA	Budget Rejected	Denied Budget Approval
Campaign Schedule Status	NEW	New	New
Campaign Schedule Status	ON_HOLD	Active Locked	On Hold
Campaign Schedule Status	SUBMITTED_BA	Pending Budget Approval	Pending Budget Approval
Campaign Status	ACTIVE	Active	Active
Campaign Status	ARCHIVED	Archived	Archived
Campaign Status	AVAILABLE	Available	Available
Campaign Status	CANCELLED	Cancelled	Cancelled
Campaign Status	CLOSED	Closed	Closed
Campaign Status	COMPLETED	Completed	Completed
Campaign Status	DENIED_BA	Denied - Budget Approval	Budget Denied
Campaign Status	DENIED_TA	Denied - Theme Approval	Theme Denied
Campaign Status	NEW	New	New
Campaign Status	ON_HOLD	On-hold	On Hold
Campaign Status	PLANNING	Planning	Planned
Campaign Status	SUBMITTED_BA	Submitted - Budget Approval	Pending Budget approval
Campaign Status	SUBMITTED_TA	Submitted - Theme Approval	Pending Theme approval
Claim Status	APPROVED	Approved	Approved
Claim Status	CANCELLED	Cancelled	Cancelled
Claim Status	CLOSED	Closed	Closed
Claim Status	COMPLETE	Complete	Complete
Claim Status	DUPLICATE	Duplicate	Duplicate
Claim Status	NEW	New	New
Claim Status	OPEN	Open	Open
Claim Status	PENDING	Pending	Pending
Claim Status	PENDING_ APPROVAL	Pending Approval	Pending Approval
Claim Status	PENDING_CLOSE	Pending Close	Pending Close
Claim Status	REJECTED	Rejected	Rejected
Deliverable Status	ARCHIVED	Archived	Archived

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Deliverable Status	AVAILABLE	Available	Final Loaded
Deliverable Status	BUDGET_APPR	Budget Approved	Budget Approval
Deliverable Status	CANCELLED	Cancelled	Cancelled
Deliverable Status	DENIED_BA	Denied - Budget Approval	Budget Denied
Deliverable Status	DENIED_TA	Denied - Concept Approval	Denied Concept Approval
Deliverable Status	EXPIRED	Expired	Expired
Deliverable Status	NEW	New	New
Deliverable Status	SUBMITTED_BA	Submitted - Budget Approval	Pending Budget approval
Deliverable Status	SUBMITTED_TA	Submitted - Concept Approval	Pending Concept Approval
Deliverable Status	SUPERCEDED	Superceded	Superceded
List Import Status	COMPLETED	Completed	Completed
List Import Status	ERROR	Error	Error
List Import Status	NEW	New	New
List Import Status	PURGED	Purged	Purged
List Import Status	SCHEDULED	Scheduled	Scheduled
List Import Status	STAGED	Staged	Staged
List Status	ARCHIVED	Archived	Archived
List Status	AVAILABLE	Available	Available
List Status	CANCELLED	Cancelled	Cancelled
List Status	DRAFT	Draft	Draft
List Status	EXECUTED	Executed	Executed
List Status	EXECUTING	Executing	Executing
List Status	GENERATING	Generating	Generating
List Status	LOCKED	Locked	Locked
List Status	SCHEDULED	Scheduled	Scheduled
List Status	VALIDATED	Validated	Validated
List Status	VALIDATING	Validating	Validating
Marketing Event Agenda Status	CONFIRMED	Confirmed	Confirmed
Marketing Event Agenda Status	UNCONFIRMED	Unconfirmed	Unconfirmed
Marketing Event Registration Status	CANCELLED	Cancelled	Cancelled

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Marketing Event Registration Status	ENROLLED	Enrolled	Enrolled
Marketing Event Registration Status	REGISTERED	Registered	Registered
Marketing Event Registration Status	TARGETED	Targeted	Targeted
Marketing Event Registration Status	WAITLISTED	Waitlisted	Waitlisted
Marketing Event Speaker Status	BOOKED	Booked	Booked
Marketing Event Speaker Status	CANCELLED	Cancelled	Cancelled
Marketing Event Speaker Status	CONFIRMED	Confirmed	Confirmed
Marketing Event Speaker Status	SCHEDULED	Scheduled	Scheduled
Marketing Event Status	ACTIVE	Active	Active
Marketing Event Status	ARCHIVED	Archived	Archived
Marketing Event Status	AVAILABLE	Available	Available
Marketing Event Status	CANCELLED	Cancelled	Cancelled
Marketing Event Status	CLOSED	Closed	Closed
Marketing Event Status	COMPLETED	Completed	Completed
Marketing Event Status	DENIED_BA	Denied Budget Approval	Budget Denied
Marketing Event Status	DENIED_TA	Denied Theme Approval	Theme Denied
Marketing Event Status	NEW	New	New
Marketing Event Status	ON_HOLD	On Hold	On Hold
Marketing Event Status	PLANNING	Planning	Planned
Marketing Event Status	SUBMITTED_BA	Submitted Budget Approval	Pending Budget approval
Marketing Event Status	SUBMITTED_TA	Submitted Theme Approval	Pending Theme approval
Model Status	ARCHIVED	Archived	Archived
Model Status	AVAILABLE	Available	Available
Model Status	BUILDING	Building	Building
Model Status	CUSTOM	Custom	Custom
Model Status	DRAFT	Draft	Draft
Model Status	EXPIRED	Expired	Expired
Model Status	QUEUED	Queued	Queued
Model Status	SCHEDULED	Scheduled	Scheduled

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Model Status	SCORING	Scoring	Scoring
Offer Status	ACTIVE	Active	Active
Offer Status	ARCHIVED	Archived	Archived
Offer Status	CANCELLED	Cancelled	Cancelled
Offer Status	CLOSED	Closed	Closed
Offer Status	COMPLETED	Completed	Completed
Offer Status	DRAFT	Draft	Draft
Offer Status	ONHOLD	On Hold	On-Hold
Offer Status	PENDING	Pending Budget Approval	Submitted - Budget Approval
Offer Status	PENDING_ACTIVE	Pending Active	Pending Active
Offer Status	REJECTED	Budget Rejected	Rejected - Budget Approval
Offer Status	TERMINATED	Terminated	Terminated
Price List Statuses	ACTIVE	Active	Active
Price List Statuses	CANCELLED	Cancelled	Cancelled
Price List Statuses	DRAFT	Draft	Draft
Price List Statuses	PENDING	Submitted For Approval	Submitted For Approval
Price List Statuses	REJECTED	Rejected	Rejected
Program Status	ACTIVE	Active	Active
Program Status	ARCHIVED	Archived	Archived
Program Status	CANCELLED	Cancelled	Cancelled
Program Status	COMPLETED	Completed	Completed
Program Status	NEW	Draft	Draft
Program Status	ON_HOLD	On Hold	On Hold
Score status	ARCHIVED	Archived	Archived
Score status	COMPLETED	Completed	Completed
Score status	DRAFT	Draft	Draft
Score status	QUEUED	Queued	Queued
Score status	SCHEDULED	Scheduled	Scheduled
Score status	SCORING	Scoring	Running
Segment Status	ARCHIVED	Archived	Archived
Segment Status	AVAILABLE	Available	Available
Segment Status	CANCELLED	Cancelled	Cancelled

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Segment Status	DRAFT	Draft	Draft
Segment Status	EXPIRED	Expired	Expired

Limitation

It is important to note that the addition of a high number of user statuses would mean that the number of values seen in the drop down for an Object's Status will also increase.

O

Customer Attributes used for Data Mining

The table below lists the customer attributes used by Oracle Marketing Online to build predictive models.

Note: On average, if more attributes are populated in the database, Oracle Marketing Online has a higher likelihood of producing accurate modeling results.

No.	Attribute Name	Description	Source	Target Audience
1	Age	Person's age	Derived from HZ_PERSON_PROFILES. DATE_OF_BIRTH and current date.	Persons
2	Gender	Person's gender code	HZ_PERSON_PROFILES. GENDER	Persons
3	Ethnicity	Person's stated ethnicity	HZ_PERSON_PROFILES. DECLARED_ETHNICITY	Persons
4	Marital Status	Person's marital status	HZ_PERSON_PROFILES. MARITAL_STATUS	Persons
5	Personal Income	Personal income	HZ_PERSON_PROFILES. PERSONAL_INCOME	Persons
6	Head of Household	Head of household indicator	HZ_PERSON_PROFILES. HEAD_OF_HOUSEHOLD_FLAG	Persons
7	Household Income	Household income	HZ_PERSON_PROFILES. HOUSEHOLD_INCOME	Persons

No.	Attribute Name	Description	Source	Target Audience
8	Household Size	Household size	HZ_PERSON_PROFILES_ HOUSEHOLD_SIZE	Persons
9	Rent Indicator	Indicates whether the residence is rented or owned	Transform on HZ_PERSON_ PROFILES. RENT_OWN_IND	Persons
10	Apartment Indicator	Indicates whether the residence is an apartment	HZ_LOCATIONS. APARTMENT_FLAG	Persons
11	Degree Received	Person's highest degree received	HZ_EDUCATION. DEGREE_ RECEIVED	Persons
12	Days Since Attended School	Days since the most recent date that the person attended school	MAX (HZ_EDUCATION. LAST_DATE_ATTENDED)	Persons
13	School Type	The classification of the educational organization. For example, High School, College, University, Professional School. Note that the name is culturally dependent.	HZ_EDUCATION. TYPE_OF_ SCHOOL	Persons
14	Interest in Art Indicator	Indicates if party is interested in arts	HZ_PERSON_INTEREST. INTEREST_TYPE_CODE = 'ART'	Persons
15	Interest in Books Indicator	Indicates if party is interested in books	HZ_PERSON_INTEREST. INTEREST_TYPE_CODE = 'BOOKS'	Persons
16	Interest in Movies Indicator	Indicates if party is interested in movies	HZ_PERSON_INTEREST INTEREST_TYPE_CODE = 'MOVIES'	Persons
17	Interest in Music Indicator	Indicates if party is interested in music	HZ_PERSON_INTEREST. INTEREST_TYPE_CODE = 'MUSIC'	Persons
18	Interest in Theater Indicator	Indicates if party is interested in theater	HZ_PERSON_INTEREST. INTEREST_TYPE_CODE = 'THEATER'	Persons

No.	Attribute Name	Description	Source	Target Audience
19	Interest in Travel Indicator	Indicates if party is interested in travel	HZ_PERSON_INTEREST. INTEREST_TYPE_CODE = 'TRAVEL'	Persons
20	Interest in Drink Indicator	Indicates if party drinks	HZ_PERSON_INTEREST. INTEREST_TYPE_CODE = 'DRINK'	Persons
21	Interest in Smoke Indicator	Indicates if party smokes	HZ_PERSON_INTEREST. INTEREST_TYPE_CODE = 'SMOKE'	Persons
22	Interest in Other Indicator	Indicates other interests of the party	HZ_PERSON_INTEREST. INTEREST_TYPE_CODE <> 'ART', 'BOOK'S, 'MOVIES', 'MUSIC', 'THEATER', ''TRAVEL', 'DRINK', ' SMOKE'.	Persons
23	Employment Indicator	Indicates whether the person is currently employed	TRUE if HZ_EMPLOYMENT_ HISTORY. END_DATE = Null	Persons
24	Years Employed	The number of years that the person has been employed	Difference between HZ_ EMPLOYMENT_HISTORY. BEGIN_DATE and current date (for record where HZ_ EMPLOYMENT_HISTORY. END_DATE = Null)	Persons
25	Occupation	The formal name for the position at that place of employment	HZ_EMPLOYMENT_HISTORY. EMPLOYED_AS_TITLE (for record where HZ_ EMPLOYMENT_HISTORY. END_DATE = Null), else - UNEMPLOYED	Persons
26	Military Branch	Branch of military in which the person served	HZ_EMPLOYMENT_HISTORY. BRANCH	Persons
27	Residence Type	Type of residence	HZ_PARTY_SITE_USES. SITE_ USE_TYPE	Persons
28	Resident Length	The length of time in which the person lived at the location	HZ_PARTY_SITE_USES. BEGIN_DATE and END_DATE for SITE_USE_TYPE = RESIDES_AT	Persons
29	Country	Country of residence	HZ_PARTIES. COUNTRY	Persons

No.	Attribute Name	Description	Source	Target Audience
30	State	State of residence.	HZ_PARTIES. STATE	Persons
31	Province	Province of residence	HZ_PARTIES. PROVINCE	Persons
32	County	County of residence	HZ_PARTIES. COUNTY	Persons
33	Zip Code	Postal code of residence	HZ_PARTIES. POSTAL_CODE	Persons
34	Net Profit	Net profit before tax	HZ_FINANCIAL_NUMBERS. (FINANCIAL_NUMBER and FINANCIAL_NUMBER_ CURRENCY where FINANCIAL_NUMBER_NAME = 'PROFIT_BEFORE_TAX')	Organization Contacts
35	Capital Amount	Capital amount	HZ_FINANCIAL_NUMBERS. [FINANCIAL_NUMBER and FINANCIAL_NUMBER_ CURRENCY where FINANCIAL_NUMBER_NAME IN ('ISSUED_CAPITAL', 'PAID_ IN_CAPITAL', 'NOMINAL_ CAPITAL', 'AUTHORIZED_ CAPITAL')]	Organization Contacts
36	Capital Type Indicator	Capital type indicator	HZ_FINANCIAL_NUMBERS. FINANCIAL_NUMBER_NAME (where FINANCIAL_ NUMBER_NAME in ('ISSUED_ CAPITAL', 'PAID_IN_ CAPITAL', 'NOMINAL_ CAPITAL', 'AUTHORIZED_ CAPITAL'))	Organization Contacts
37	Accounts Receivable	Accounts receivable	HZ_FINANCIAL_NUMBERS. (FINANCIAL_NUMBER and FINANCIAL_NUMBER_ CURRENCY where FINANCIAL_NUMBER_NAME = 'ACCOUNTS_RECEIVABLE')	Organization Contacts
38	Retained Earnings	Retained earnings	HZ_FINANCIAL_NUMBERS. (FINANCIAL_NUMBER and FINANCIAL_NUMBER_ CURRENCY where FINANCIAL_NUMBER_NAME = 'RETAINED_EARNINGS')	Organization Contacts

No.	Attribute Name	Description	Source	Target Audience
39	Paydex Score per Year	Paydex score for the last year	HZ_ORGANIZATION_ PROFILES. PAYDEX_SCORE	Organization Contacts
40	Paydex Score 3 Month Ago	Paydex score 3 months ago	HZ_ORGANIZATION_ PROFILES. PAYDEX_THREE_ MONTHS_AGO	Organization Contacts
41	Industry Paydex Median	Industry Paydex Median	HZ_ORGANIZATION_ PROFILES. PAYDEX_NORM	Organization Contacts
42	Global Failure Score	Global Failure Score	HZ_ORGANIZATION_ PROFILES. GLOBAL_ FAILURE_SCORE	Organization Contacts
43	D&B Score	Dunn and Bradstreet Score for the organization	HZ_ORGANIZATION_ PROFILES. DB_RATING	Organization Contacts
44	Out of Business Indicator	Indicates if organization is out of business	HZ_ORGANIZATION_ PROFILES. OOB_IND	Organization Contacts
45	Number of Employees	Number of employees	HZ_ORGANIZATION_ PROFILES. EMPLOYEES_ TOTAL	Organization Contacts
46	Legal Status	Indicates legal status	HZ_ORGANIZATION_ PROFILES. LEGAL_STATUS	Organization Contacts
47	Year of Establishment	Year of establishment	HZ_ORGANIZATION_ PROFILES. YEAR_ ESTABLISHED	Organization Contacts
48	SIC Code	SIC Code	HZ_ORGANIZATION_ PROFILES. SIC_CODE	Organization Contacts
49	Minority Business Indicator	Indicates whether the business is minority owned	HZ_ORGANIZATION_ PROFILES. MINORITY_ OWNED_IND	Organization Contacts
50	Small Business Indicator	Indicates is this is a small business	HZ_ORGANIZATION_ PROFILES. SMALL_BUS_IND	Organization Contacts
51	Women Owned Indicator	Indicates whether the business is women owned	HZ_ORGANIZATION_ PROFILES. WOMAN_OWNED_ IND	Organization Contacts

No.	Attribute Name	Description	Source	Target Audience
52	Import-Export Business	Indicates whether the business is an import/export business	In HZ_ORGANIZATIONS, if either IMPORT_IND or EXPORT_IND are true, then true	Organization Contacts
53	Gross Annual Income	Gross annual income	HZ_FINANCIAL_NUMBERS. (FINANCIAL_NUMBER and FINANCIAL_NUMBER_ CURRENCY where FINANCIAL_NUMBER_NAME = 'GROSS_INCOME')	Both Persons and Organization Contacts
54	Debt to Income Ratio	Gross long term debt	HZ_FINANCIAL_NUMBERS. (FINANCIAL_NUMBER and FINANCIAL_NUMBER_ CURRENCY where FINANCIAL_NUMBER_NAME = 'LONG_TERM_DEBT')	Both Persons and Organization Contacts
55	Net Worth	Net worth	HZ_FINANCIAL_NUMBERS. (FINANCIAL_NUMBER and FINANCIAL_NUMBER_ CURRENCY where FINANCIAL_NUMBER_NAME = 'NET_WORTH')	Both Persons and Organization Contacts
56	Total Assets	Total assets	HZ_FINANCIAL_NUMBERS. (FINANCIAL_NUMBER and FINANCIAL_NUMBER_ CURRENCY where FINANCIAL_NUMBER_NAME = 'TOTAL_ASSETS')	Both Persons and Organization Contacts
57	Total Debt Outstanding	Total outstanding debt	HZ_FINANCIAL_NUMBERS. (FINANCIAL_NUMBER and FINANCIAL_NUMBER_ CURRENCY where FINANCIAL_NUMBER_NAME = 'LONG_TERM_DEBT')	Both Persons and Organization Contacts
58	Gross Annual Sales	Gross annual sales	HZ_FINANCIAL_NUMBERS. (FINANCIAL_NUMBER and FINANCIAL_NUMBER_ CURRENCY where FINANCIAL_NUMBER_NAME = 'SALES')	Both Persons and Organization Contacts

No.	Attribute Name	Description	Source	Target Audience
59	Current Assets	Current assets	HZ_FINANCIAL_NUMBERS. (FINANCIAL_NUMBER and FINANCIAL_NUMBER_ CURRENCY where FINANCIAL_NUMBER_NAME = 'TOTAL_CURRENT_ ASSETS')	Both Persons and Organization Contacts
60	Current Liabilities	Current liabilities	HZ_FINANCIAL_NUMBERS. (FINANCIAL_NUMBER and FINANCIAL_NUMBER_ CURRENCY where FINANCIAL_NUMBER_NAME = 'TOTAL_CURR_ LIABILITIES')	Both Persons and Organization Contacts
61	Credit Check	Indicates whether a credit check is required	HZ_CUSTOMER_PROFILES. CREDIT_CHECKING through HZ_CUST_ACCOUNTS	Both Persons and Organization Contacts
62	Tolerance	Percentage over credit limit that this customer can exceed before action is taken	HZ_CUSTOMER_PROFILES. TOLERANCE through HZ_ CUST_ACCOUNTS	Both Persons and Organization Contacts
63	Discount Terms Indicator	Indicates whether to allow discount terms	HZ_CUSTOMER_PROFILES. DISCOUNT_TERMS through HZ_CUST_ACCOUNTS	Both Persons and Organization Contacts
64	Dunning Letters Indicator	Indicates whether to send dunning letters to this customer when invoices, debit memos or chargebacks become past due	HZ_CUSTOMER_PROFILES. DUNNING_LETTERS through HZ_CUST_ACCOUNTS	Both Persons and Organization Contacts
65	Interest Charges Indicator	Indicates whether to charge this customer interest	HZ_CUSTOMER_PROFILES. INTEREST_CHARGES through HZ_CUST_ACCOUNTS	Both Persons and Organization Contacts
66	Send Statements Indicator	Indicates whether to send statements to this customer	HZ_CUSTOMER_PROFILES. SEND_STATEMENTS through HZ_CUST_ACCOUNTS	Both Persons and Organization Contacts

No.	Attribute Name	Description	Source	Target Audience
67	Credit Hold Indicator	Indicates whether to put a hold on this customer's credit	HZ_CUSTOMER_PROFILES. CREDIT_HOLD through HZ_ CUST_ACCOUNTS	Both Persons and Organization Contacts
68	Credit Rating	Credit rating	HZ_CUSTOMER_PROFILES. CREDIT_RATING through HZ_ CUST_ACCOUNTS	Both Persons and Organization Contacts
69	Risk Code	Risk code	HZ_CUSTOMER_PROFILES. RISK_CODE through HZ_ CUST_ACCOUNTS	Both Persons and Organization Contacts
70	Days of Interest Period	Number of days to which the interest rate refers	HZ_CUSTOMER_PROFILES. INTEREST_PERIOD_DAYS through HZ_CUST_ ACCOUNTS	Both Persons and Organization Contacts
71	Days of Payment Grace	Maximum number of overdue days allowed before action is taken	HZ_CUSTOMER_PROFILES. PAYMENT_GRACE_DAYS through HZ_CUST_ ACCOUNTS	Both Persons and Organization Contacts
72	Days Since Last Event	Days since last event attended	MAX (AMS_EVENT_OFFERS_ VL. EVENT_START_DATE) where PARTY_ID in (AMS_ EVENT_REGISTRATIONS. ATTENDANT_PARTY_ID)	Both Persons and Organization Contacts
73	Number of Times Targeted	Number of times targeted	AMS_LIST_HEADERS_VL. SENT_OUT_DATE is not Null AND party is in AMS_LIST_ ENTRIES. PARTY_ID	Both Persons and Organization Contacts
74	Last Targeted Channel Code	The most recent channel targeted	Derived using AMS_ CAMPAIGN_SCHEDULES_VL, AMS_LIST_HEADERS_VL, and AMS_LIST_ENTRIES fields	Both Persons and Organization Contacts
75	Times Targeted per Month	Number of times targeted per month	Derived using AMS_LIST_ HEADERS_VL. SENT_OUT_ DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ ID for last month	Both Persons and Organization Contacts

No.	Attribute Name	Description	Source	Target Audience
76	Times Targeted in 3 Months	Number of times targeted in the last three months	Derived using AMS_LIST_HEADERS_VL. SENT_OUT_DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ID for last 3 months	Both Persons and Organization Contacts
77	Times Targeted in 6 Months	Number of times targeted in the last six months	Derived using AMS_LIST_HEADERS_VL. SENT_OUT_DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ID for last 6 months	Both Persons and Organization Contacts
78	Times Targeted in 12 Months	Number of times targeted in the last twelve months	Derived using AMS_LIST_HEADERS_VL. SENT_OUT_DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ID for last year	Both Persons and Organization Contacts
79	Days Since Last Targeted	The most recent date the party was targeted	Derived using MAX (AMS_LIST_HEADERS_VL. SENT_OUT_DATE) where party in AMS_LIST_ENTRIES. PARTY_ID	Both Persons and Organization Contacts
80	Average Discount Offered	Average discount offered	Derived using AMS_ACT_OFFERS and AMS_CAMPAIGN_SCHEDULES_VL fields	Both Persons and Organization Contacts
81	Number of Types Discount Offered	Number of types of discounts offered	Derived using AMS_ACT_OFFERS And AMS_CAMPAIGN_SCHEDULES_VL fields	Both Persons and Organization Contacts
82	Number of Targeted by Email	Number of times a party has been targeted by email	Derived using AMS_LIST_ENTRIES, AMS_LIST_HEADERS_ALL, AMS_CAMPAIGN_SCHEDULES_B, AMS_MEDIA_VL	Both Persons and Organization Contacts
83	Number of Targeted by Direct Mail	Number of times a party has been targeted by direct mail	Derived using AMS_LIST_ENTRIES, AMS_LIST_HEADERS_ALL, AMS_CAMPAIGN_SCHEDULES_B, AMS_MEDIA_VL	Both Persons and Organization Contacts

No.	Attribute Name	Description	Source	Target Audience
84	Number of Targeted by Telemarketing	Number of times a party has been targeted by telemarketing	Derived using AMS_LIST_ENTRIES, AMS_LIST_HEADERS_ALL, AMS_CAMPAIGN_SCHEDULES_B, AMS_MEDIA_VL	Both Persons and Organization Contacts
85	Number of Targeted by Offer Type 1	Number of times a party has been targeted by offers of type 'Accrual'	Derived using AMS_LIST_ENTRIES, AMS_LIST_HEADERS_ALL, AMS_CAMPAIGN_SCHEDULES_B, AMS_ACT_OFFERS	Both Persons and Organization Contacts
86	Number of Targeted by Offer Type 2	Number of times a party has been targeted by offers of type 'Lumpsum'	Derived using AMS_LIST_ENTRIES, AMS_LIST_HEADERS_ALL, AMS_CAMPAIGN_SCHEDULES_B, AMS_ACT_OFFERS	Both Persons and Organization Contacts
87	Number of Targeted by Offer Type 3	Number of times a party has been targeted by offers of type 'Order'	Derived using AMS_LIST_ENTRIES, AMS_LIST_HEADERS_ALL, AMS_CAMPAIGN_SCHEDULES_B, AMS_ACT_OFFERS	Both Persons and Organization Contacts
88	Number of Targeted by Offer Type 4	Number of times a party has been targeted by offers of type 'Off_Invoice'	Derived using AMS_LIST_ENTRIES, AMS_LIST_HEADERS_ALL, AMS_CAMPAIGN_SCHEDULES_B, AMS_ACT_OFFERS	Both Persons and Organization Contacts
89	Days Since First Contact	Dance since the initial contact	Derived using MIN (AMS_LIST_HEADERS_VL. SENT_OUT_DATE) where SENT_OUT_DATE is not Null, and AMS_LIST_ENTRIES fields	Both Persons and Organization Contacts
90	Average Talk Time	Average talk time	BIC_PARTY_SUMM. AVG_TALK_TIME	Both Persons and Organization Contacts
91	Average Order Amount	Average (mean) order amount	BIC_PARTY_SUMM. ORDER_AMT divided by ORDER_NUM	Both Persons and Organization Contacts

No.	Attribute Name	Description	Source	Target Audience
92	Average Units per Order	Average (mean) units per order	BIC_PARTY_SUMM. ORDER_ QTY divided by ORDER_NUM	Both Persons and Organization Contacts
93	Total Order Amount Last Year	Total order amount over the past year	SUM (BIC_PARTY_SUMM. ORDER_AMT) over the past year	Both Persons and Organization Contacts
94	Total Order Amount Last 9 Months	Total order amount over the past nine months	SUM (BIC_PARTY_SUMM. ORDER_AMT) over the past 9 months	Both Persons and Organization Contacts
95	Total Order Amount Last 6 Months	Total order amount over the past six months	SUM (BIC_PARTY_SUMM. ORDER_AMT) over the past 6 months	Both Persons and Organization Contacts
96	Total Order Amount Last 3 Months	Total order value over the past three months	SUM (BIC_PARTY_SUMM. ORDER_AMT) over the past 3 months	Both Persons and Organization Contacts
97	Total Number of Orders Last Year	Total number of orders over the past year	SUM (BIC_PARTY_SUMM. ORDER_QTY) over the past year	Both Persons and Organization Contacts
98	Total Number of Orders Last 9 Months	Total number of orders over the past nine months	SUM (BIC_PARTY_SUMM. ORDER_QTY) over the past 9 months	Both Persons and Organization Contacts
99	Total Number of Orders Last 6 Months	Total number of orders over the past six months	SUM (BIC_PARTY_SUMM. ORDER_QTY) over the past 6 months	Both Persons and Organization Contacts
100	Total Number of Orders Last 3 Months	Total number of orders over the past three months	SUM (BIC_PARTY_SUMM. ORDER_QTY) over the past 3 months	Both Persons and Organization Contacts

No.	Attribute Name	Description	Source	Target Audience
101	Days Since Account Established	Days since account was established	HZ_CUST_ACCOUNTS. ACCOUNT_ESTABLISHED_DATE	Both Persons and Organization Contacts
102	Days Since Account Termination	Days since account termination	HZ_CUST_ACCOUNTS. ACCOUNT_TERMINATION_DATE	Both Persons and Organization Contacts
103	Days Since Account Activation	Days since account was activated	HZ_CUST_ACCOUNTS. ACCOUNT_ACTIVATION_DATE	Both Persons and Organization Contacts
104	Days Since Account Suspended	Days since account was suspended	HZ_CUST_ACCOUNTS. SUSPENSION_DATE	Both Persons and Organization Contacts
105	Number of Service Requests Last Year	Number of service requests for the past year	SUM (BIC_PARTY_SUMM. SRS_LOGGED) over the past year	Both Persons and Organization Contacts
106	Number of Service Requests Last 6 Months	Number of service requests for the last six months	SUM (BIC_PARTY_SUMM. SRS_LOGGED) over the last 6 months	Both Persons and Organization Contacts
107	Number of Service Requests Last 3 Months	Number of service requests for the last three months	SUM (BIC_PARTY_SUMM. SRS_LOGGED) over the last 3 months	Both Persons and Organization Contacts
108	Number of Service Requests Last Month	Number of service requests for the last month	BIC_PARTY_SUMM. SRS_LOGGED	Both Persons and Organization Contacts
109	Average Resolve Days Last Year	Average days for resolution (of a service request) over the past year	BIC_PARTY_SUMM. AVG_SR_RESL_TIME over the past year	Both Persons and Organization Contacts
110	Average Resolve Days Last 6 Months	Average days for resolution (of a service request) over the past six months	BIC_PARTY_SUMM. AVG_SR_RESL_TIME over the last 6 months	Both Persons and Organization Contacts

No.	Attribute Name	Description	Source	Target Audience
111	Average Resolve Days Last 3 Months	Average days for resolution (of a service request) over the past three months	BIC_PARTY_SUMM. AVG_SR_ RESL_TIME over the last 3 months	Both Persons and Organization Contacts
112	Average Resolve Days Last Month	Average days for resolution (of a service request) over the last month	BIC_PARTY_SUMM. AVG_SR_ RESL_TIME	Both Persons and Organization Contacts
113	Number of Orders Delivered	Number of orders fulfilled	BIC_PARTY_SUMM. ORDER_ LINES_DELIVERED	Both Persons and Organization Contacts
114	Number of Order Ontime	On-time delivery rate (% of order lines where shipped date is on or before order request date)	BIC_PARTY_SUMM. ORDER_ LINES_ONTIME	Both Persons and Organization Contacts
115	Number of Orders	Total items ordered (all-time)	BIC_PARTY_SUMM. ORDER_ QTY_CUML	Both Persons and Organization Contacts
116	Order Recency	Order recency in days - days between the last order date and the last date of the period, as defined in GL periods	BIC_PARTY_SUMM. ORDER_ RECENCY	Both Persons and Organization Contacts
117	Payments	Number of payments	BIC_PARTY_SUMM. PAYMENTS	Both Persons and Organization Contacts
118	Returns	Number of returns (order returns)	BIC_PARTY_SUMM. RETURNS	Both Persons and Organization Contacts
119	Returns by Value	Monetary value of returns	BIC_PARTY_SUMM. RETURN_ BY_VALUE	Both Persons and Organization Contacts

No.	Attribute Name	Description	Source	Target Audience
120	Returns by Value Percent	Percent of returns relative to the number of orders	BIC_PARTY_SUMM. RETURN_ BY_VALUE_PCT	Both Persons and Organization Contacts
121	Ontime Payments	Average number of invoices paid on or before due date	BIC_PARTY_SUMM. ONTIME_ PAYMENTS	Both Persons and Organization Contacts
122	Ontime Shipped Percent	Percent of order lines shipped where the shipped date is on or before the order request date	BIC_PARTY_SUMM. ONTIME_ SHIP_PCT	Both Persons and Organization Contacts
123	Closed Service Requests	Total number of closed service requests	BIC_PARTY_SUMM. CLOSED_ SRS	Both Persons and Organization Contacts
124	Cost of Goods Sold	Cost of goods sold – calculated by multiplying cost by number of units sold	BIC_PARTY_SUMM. COGS	Both Persons and Organization Contacts
125	Number of Contracts Cumulative	Cumulative total number of contracts	BIC_PARTY_SUMM. CONTRACTS_CUML	Both Persons and Organization Contacts
126	Contracts Amount	Total amount specified in the contracts	BIC_PARTY_SUMM. CONTRACT_AMT	Both Persons and Organization Contacts
127	Contracts Duration	Average duration of new contracts from the point of creation or renewal	BIC_PARTY_SUMM. CONTRACT_DURATION	Both Persons and Organization Contacts
128	Number Inactive Contracts	Total number of contracts inactivated	BIC_PARTY_SUMM. INACTIVE_CONTRACTS	Both Persons and Organization Contacts

No.	Attribute Name	Description	Source	Target Audience
129	Number Open Contracts	Total number of active contracts	BIC_PARTY_SUMM. OPEN_CONTRACTS	Both Persons and Organization Contacts
130	Number New Contracts	Total number of new contracts	BIC_PARTY_SUMM. NEW_CONTRACTS	Both Persons and Organization Contacts
131	Number Renewed Contracts	Total number of contracts renewed	BIC_PARTY_SUMM. RENEWED_CONTRACTS	Both Persons and Organization Contacts
132	Total Escalated Service Requests	Total escalated service requests	BIC_PARTY_SUMM. ESC_SRS	Both Persons and Organization Contacts
133	First Call Closure Rate	First call closure rate	BIC_PARTY_SUMM. FIRST_CALL_CL_RATE	Both Persons and Organization Contacts
134	Number of Complaints	Number of complaints or escalated calls	BIC_PARTY_SUMM. NO_OF_COMPLAINTS	Both Persons and Organization Contacts
135	Number of Interactions	Total number of interactions	BIC_PARTY_SUMM. NO_OF_INTERACTIONS	Both Persons and Organization Contacts
136	Number of Transfers	Number of transfers before resolution	BIC_PARTY_SUMM. NO_OF_TRANSFERS	Both Persons and Organization Contacts
137	Number of Open Service Requests	Total number of open service requests	BIC_PARTY_SUMM. OPEN_SRS	Both Persons and Organization Contacts

No.	Attribute Name	Description	Source	Target Audience
138	Percent of Calls Rework	Percent of calls requiring rework	BIC_PARTY_SUMM. PERCT_ CALL_REWORK	Both Persons and Organization Contacts
139	Products	Number of products ordered	BIC_PARTY_SUMM. PRODUCTS	Both Persons and Organization Contacts
140	Referrals	Total number of referrals	BIC_PARTY_SUMM. REFERALS	Both Persons and Organization Contacts
141	Number of Reopened Service Requests	Total number of reopened service requests	BIC_PARTY_SUMM. REOPENED_SRS	Both Persons and Organization Contacts
142	Sales	Total number of closed sales	BIC_PARTY_SUMM. SALES	Both Persons and Organization Contacts
143	Total Service Requests Response Time	Total response (assigned) time of service requests (average number of days between service requests open and assigned)	BIC_PARTY_SUMM. TOTAL_ SR_RESPONSE_TIME	Both Persons and Organization Contacts
144	Percent First Closed Service Requests	Percent of service requests closed on the first call	BIC_PARTY_SUMM. AVG_ CLOSED_SRS	Both Persons and Organization Contacts
145	Number Average Complaints	Average number of complains	BIC_PARTY_SUMM. AVG_ COMPLAINTS	Both Persons and Organization Contacts
146	Average Hold Time	Average hold time	BIC_PARTY_SUMM. AVG_ HOLD_TIME	Both Persons and Organization Contacts

No.	Attribute Name	Description	Source	Target Audience
147	Average Service Employment Length	Average length of employment of service reps on service requests logged	BIC_PARTY_SUMM. AVG_ LEN_OF_EMP	Both Persons and Organization Contacts
148	Average Transfers per Service Requests	Average number of transfers for each service request	BIC_PARTY_SUMM. AVG_ TRANSFERS_PER_SR	Both Persons and Organization Contacts
149	Average Workload	Average workload of service reps (average number of service requests per service rep)	BIC_PARTY_SUMM. AVG_ WORKLOAD	Both Persons and Organization Contacts
150	Number of Calls	Total number of calls	BIC_PARTY_SUMM. CALLS	Both Persons and Organization Contacts
151	Average Call Length	Average length of a call	BIC_PARTY_SUMM. CALL_ LENGTH	Both Persons and Organization Contacts
152	Profitability	Total actual revenue minus costs of good sold divided by total actual revenue	BIC_PARTY_SUMM. PROFITABILITY	Both Persons and Organization Contacts

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Configuring Business Intelligence Bins, Reports and Charts

The following table shows the available Bins, Reports and Charts:

Name	Type	Description
Campaign Effectiveness	Bin	Summarizes the total number of leads and lead amount created against campaigns during the period
Event Effectiveness	Bin	Summarizes the total number of registrations, leads and lead amount created against events during the period
Marketing Activities	Bin	Summarizes the number of active campaign and event schedules for a given period
Marketing Budgets	Bin	Summarizes the amount of budget committed, utilized and balance for a given period
Response to Lead (Key Metrics)	Bin	Summarizes the Key Performance Indicators from Marketing Online and other modules
Budget Utilization (Budget by Total Amount)	Report	Summarizes budget utilization information
Budgets by Activity	Report	Summarizes budget information per activity.
Budgets by Business Unit	Report	Summarizes budget information per business unit

Name	Type	Description
Budgets by Campaign	Report	Summarizes budget information per campaign
Campaign Cost, Revenue and ROI	Report	Summarizes costs, revenues and return on investments per campaign
Campaign Cost and Revenue	Report	Summarizes costs and revenues per campaign
Campaign to Order	Report	Summarizes order information per campaign
Campaigns by Activity	Report	Summarizes campaign information per activity
Campaigns by Budget Amount	Report	Summarizes budget information per campaign
Campaigns by Leads and Opportunities	Report	Summarizes lead and opportunity information per campaign
Event Cost and Revenue	Report	Summarizes cost and revenue information per event
Event Cost, Revenue and ROI	Report	Summarizes costs, revenues and return on investments per event.
Events by Budget Amount	Report	Summarizes budget information per event
Event by Event Type	Report	Summarizes budget and event information per event type
Events by Leads and Opportunities	Report	Summarizes leads and opportunities information per event
Events by Registrants	Report	Summarizes registration information per event
Budget Utilization by Business Unit	Chart	Summarizes the top ten budgets by Business Unit
Budget Utilization by Category	Chart	Summarizes the top ten budgets by Category
Campaigns by Leads	Chart	Summarizes the top ten campaigns by leads
Campaign by Opportunity	Chart	Summarizes the top ten campaigns by opportunities

Name	Type	Description
Events by Attendance	Chart	Summarizes the top ten events by attendance
Events by Registrations	Chart	Summarizes the top ten events by registrations
Events by Leads	Chart	Summarizes the top ten events by leads
Leads and Cost per Lead	Chart	Summarizes the number of leads to their cost.

BIN: Campaign Effectiveness

Name

Campaign Effectiveness

Business Purpose

This bin summarizes the total number of Leads and Lead Amounts created against Campaigns during the period.

Note: This is all leads except Dead leads.

Columns

Period	Period is displayed based on the option chosen in parameter 'Aggregate by'. The period displayed is hyper linked to the following drill down reports : ▪ Campaigns by Leads and Opportunities ▪ Campaigns by Activity ▪ Campaigns by Budget Amount ▪ Campaign by Orders The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.
Lead	Total number of leads created against the campaigns during the period. This excludes dead leads.
Lead Amount	The sum of Lead amount of all leads created against the campaigns during the period.

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'.
Aggregate By	Data can be aggregated by period. Default is Quarter. ▪ Month - Aggregates by Month defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ▪ Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ▪ Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'.
Scale by	Scale the amount columns by user choice. Available options: ▪ Units ▪ Hundreds ▪ Thousands ▪ Millions

BIN: Event Effectiveness

Name

Event Effectiveness

Business Purpose

This bin summarizes the total number of Registrations, Leads and Lead Amounts created against Events during the period.

Note: This is all leads except Dead leads.

Columns

Period	Period is displayed based on the option chosen in parameter 'Aggregate by'. . The period displayed is hyper linked to the following drill down reports : Events by Leads and Opportunities Events by Event type Events by Budget Amount Events by Registrants The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.
Registration	Total number of registrations created against the events during the period.
Lead	Total number of leads created against the events during the period. This excludes dead leads.
Lead Amount	The sum of Lead amount of all leads created against the events during the period.

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'
Aggregate By	Data can be aggregated by period. Default is Quarter. ■ Month - Aggregates by Month defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'.

Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

BIN: Marketing Activities

Name

Marketing Activities

Business Purpose

This bin summarizes the number of active Campaign and Event Schedules for a given period.

Columns

Period	Period is displayed based on the option chosen in parameter 'Aggregate by'.
Count	The number of active Campaign and Event Activities at the start of the period.
Started	The number of Campaign and Event Activities activated during the period.
Ended	The number of Campaign and Event Activities that ended during the period.
Change	The change from previous value to current value. Formula: ((Current - Previous) / Previous) * 100

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.

<table>
<tr><td>Business Unit</td><td>Lists all business units defined in HR Organizations with type ‘BU’. User can choose a business unit or ‘All’ for all business units. . Default is set to ‘All’</td></tr>
<tr><td>Aggregate By</td><td>Data can be aggregated by period. Default is Quarter.

Month - Aggregates by Month defined in GL Calendar associated with the profile option ‘AMS Marketing Calendar’.
Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option ‘AMS Marketing Calendar’.
Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option ‘AMS Marketing Calendar’.
Incremental (Day, Week, Month, Quarter, Year)
Aggregated as follows:

Day is 24 hours prior to Last Refresh Date/Time.
Wk is 7 days prior to Last Refresh Date/Time (Rolling 7 Days).
Mth is from start of current month to Last Refresh Date/Time.
Qtr is from start of current fiscal quarter to Last Refresh Date/Time.
Yr is current fiscal quarter plus previous 3 fiscal quarters (Rolling 4 Quarters).

Examples:

Day 9-Nov-01 to 10-Nov-01
Wk   4-Nov-01 to 10-Nov-01
Mth 1-Nov-01 to 10-Nov-01
Qtr   1-Sep-01 to 10-Nov-01
Yr   1-Dec-00 to 10-Nov-01 0
</td></tr>
</table>

BIN: Marketing Budgets

Name

Marketing Budgets

Business Purpose

This bin summarizes the amount of Budget committed, utilized and balance for a given period. Note that only those budgets, which have a presence in the given time period, is considered for calculating these figures. For example, a budget is active for a period of 3 months starting from '01-Mar-2001' to '31-May-2001'. This budget is considered for calculating the total committed, utilized and balance amounts only for months of March, April and May 2001.

Columns

Period	Period is displayed based on the option chosen in parameter 'Aggregate by'. The period displayed is hyperlinked to the following drill down reports: ■ Budgets by Utilization ■ Budgets by Activity ■ Budgets by Campaign ■ Budgets by Business Unit The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.
Committed	The sum of all the budget commitments or approvals made during the period.
Utilized	The sum of all the budgets utilization occurred during the period. Budget utilization is recorded only the Actual costs are posted to Budgets.
Balance	The sum of the balance of all the budgets which have a presence during the period.

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'

Aggregate By	Data can be aggregated by period. Default is Quarter. ■ Month - Aggregates by Month defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Incremental (Day, Week, Month, Quarter, Year) Aggregated as follows: ■ Day is 24 hours prior to Last Refresh Date/Time. ■ Wk is 7 days prior to Last Refresh Date/Time (Rolling 7 Days). ■ Mth is from start of current month to Last Refresh Date/Time. ■ Qtr is from start of current fiscal quarter to Last Refresh Date/Time. ■ Yr is current fiscal quarter plus previous 3 fiscal quarters (Rolling 4 Quarters). Examples: ■ Day 9-Nov-01 to 10-Nov-01 ■ Wk 4-Nov-01 to 10-Nov-01 ■ Mth 1-Nov-01 to 10-Nov-01 ■ Qtr 1-Sep-01 to 10-Nov-01 ■ Yr 1-Dec-00 to 10-Nov-01
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

Note: When budget facts are loaded, the program will consider pre-approval transactions. When preapproval transactions are considered, there may be time periods for which there is no data. The summarized data may not have information in the comparative period and thus may not be able to display a positive or negative value in the form of an arrow.

BIN: Response to Lead (Key Metrics)

Name

Response to Lead

Business Purpose

This bin summarizes the Key Performance Indicators from Marketing Online and other modules.

Columns

Key Metrics	Key Metrics: ▪ Leads, ▪ 'A' Lead Ratio ▪ Cost per Lead ▪ Revenue per Lead Each key metric is a hyperlink to drilldown detail reports specific to each key metric. Currently Leads and 'A' Lead Ratio do not drill down to any reports. However, Cost per Lead and Revenue per Lead drill to the following reports: ▪ Campaign Cost and Revenue ▪ Event Cost and Revenue The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.

Value	■ Leads Shows the total amount of all leads during the period. (NOTE: This is all leads except Dead leads). ■ 'A' Lead Ratio Shows the percentage of 'A' (top) quality leads of all leads during the period. (NOTE: This is all leads except Deal leads.) The Value is calculated by dividing the number of all 'A' quality leads during the period by the total number of leads. ■ Cost per Lead Shows the budgetary cost of generating all leads during the period. The Value is calculated by dividing the budget of all current Campaign and Events during the period by the total number of leads. Equally allocated per "active" day. ■ Revenue per Lead Shows the booked revenue ratio as a result of all leads that were generated during the period The Value is calculated by dividing the booked revenue associated with all leads during the period by the total number of leads.
Change	■ Leads : The Change is calculated by comparing the total number of leads for the current period with the total number of leads for the previous refresh period. E.g. if on October 1 there were 1,000 leads and on November 1 there were 1,200, to get the % Change, take ((1,200 - 1,000)/1,000) * 100. The negative(-) or positive (+) signs indicate if the change is up or down from the previous period. ■ 'A' Lead Ratio : The Change is calculated by comparing the 'A' quality lead ratio for the current period with the 'A' quality lead ratio for the previous refresh period. ■ Cost per Lead : The Change is calculated by comparing the cost per lead ratio for the current period with the cost per lead ratio for the previous refresh period. ■ Revenue per Lead : The Change is calculated by comparing the revenue per lead for the current period with the revenue per lead for the previous refresh period.
Status	The Status column is common across all Key Metrics. The indicator arrow images mean the following: ■ Green Up - Indicates data increasing over the comparison period and that for this attribute, an increase is good. ■ Green Down - Indicates data decreasing over the comparison period and that for this attribute, a decrease is good. ■ Red Up - Indicates data increasing over the comparison period and that for this attribute, an increase is bad. ■ Red Down - Indicates data decreasing over the comparison period and that for this attribute, a decrease is bad.

Status Arrows

Column	From Prev Period	Green Up	Green Down	Red Up	Red Down
Leads	Increase	X			
Leads	Decrease				X
A Leads	Increase	X			
A Leads	Decrease				X
Cost/Lead	Increase			X	
Cost/Lead	Decrease		X		
Revenue/Lead	Increase	X			
Revenue/Lead	Decrease				X

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.

Fixed Calculation Period	Data can be aggregated by period. Default is Quarter. ■ Daily - Last 24 hours (Last refresh date) ■ Weekly - Start of week to current date, up to 7 days. Week begins on a Sunday. ■ Monthly - Start of month, up to 30 days. ■ Quarterly - Start of current quarter, up to current date. ■ Yearly - Start of current fiscal year, up to current date. Examples: ■ Daily 9-Nov-01 to 10-Nov-01 ■ Weekly 4-Nov-01 to 10-Nov-01 ■ Monthly 1-Nov-01 to 10-Nov-01 ■ Quarterly 1-Sep-01 to 10-Nov-01 ■ Yearly 1-Jun-01 to 10-Nov-01

REPORT: Budget Utilization (Budget by Total Amount)

Name

Budget Utilization

Business Purpose

This report summarizes Budget utilization information.

Columns

Budget Name	Budget name
Total	This represent total budget minus holdback.
Planned	Sum of planned amount. Planned amount is any amount for which new campaigns or offers are in Waiting or Approval stage.
Committed	Sum of committed amount. Committed amount is any amount for campaigns with an Approval status.
Utilized	Sum of the amount of total budget earned or used.
Balance	Sum of the amount of funds available for further activity. Balance = Budget – Committed

Paid	Sum of paid amount. Paid amount is the total paid on the promotion, amounts deducted on the face of the invoice, rendered checks and submitted credit memos.
Category	A category in which the budget falls.

Parameters

Region Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.

Country Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.

Business Unit Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.

Scale by Scale the amount columns by user choice. Available options:

- Units
- Hundreds
- Thousands
- Millions

REPORT: Budgets by Activity

Name

Budgets by Activity

Business Purpose

This report summarizes Budget information per Activity.

Columns

Activity	Activity name.
Number of Budgets	The number of budgets currently opened for this Activity.

Approved Budget Amount	The total budget amount allocated to the Activity by approved budget lines
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Activity

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ▪ Units ▪ Hundreds ▪ Thousands ▪ Millions

REPORT: Budgets by Business Unit

Name

Budgets by Business Unit

Business Purpose

This report summarizes Budget information per Business Unit.

Columns

Business Unit	Business Unit name.
Number of Budgets	The number of budgets currently opened for this business unit.

Total	This represent total budget
Planned	Sum of planned amount. Planned amount is any amount for which new campaigns or offers are in Waiting or Approval stage.
Committed	Sum of committed amount. Committed amount is any amount for campaigns with an Approval status.
Utilized	Sum of the amount of total budget earned or used.
Paid	Sum of paid amount. Paid amount is the total paid on the promotion, amounts deducted on the face of the invoice, rendered checks and submitted credit memos.

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ▪ Units ▪ Hundreds ▪ Thousands ▪ Millions

REPORT: Budgets by Campaign

Name

Budgets by Campaigns

Business Purpose

This report summarizes Budget information per Campaign.

Columns

Campaign Name	Campaign name.
Number of Budgets	The number of budgets currently opened for this Campaign.
Approved Budget Amount	The total budget amount allocated to the Activity by approved budget lines.
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Activity

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

REPORT: Campaign Cost, Revenue and ROI

Name

Campaign Cost, Revenue and ROI

Business Purpose

This report summarizes Costs, Revenues and Return on Investments per Campaign.

Columns

Campaign	Campaign name.
Actual Cost	Period to-date cost - The cumulative amount of the approved budget for the period.
Forecasted Cost	From Metrics value. Summarize schedule cost and the parent cost.
Cost Variance	((actual – forecast) / forecast) * 100
Actual Revenue	Booked order amount in Quoting/Order Capture.
Forecasted Revenue	From Metrics value. Summarize schedule revenue and the parent revenue.
Revenue Variance	((actual – forecast) / forecast) * 100
Actual ROI	((actual revenue - actual cost) / actual cost) * 100
Forecasted ROI	((forecast rev - fore cost) / forecast cost) * 100
ROI Variance	((actual - forecast) / forecast) * 100

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions
Period	Data can be aggregated by period. Default is Current Quarter. ■ A list of all fiscal Years ■ A list of all quarters

REPORT: Campaign Cost and Revenue

Name

Campaign Cost and Revenue

Business Purpose

This report summarizes Costs and Revenues per Campaign.

Columns

Campaign	Campaign Name.
Total Cost	Period-to-date cost - The cumulative amount of the approved budget for the period.
Total Revenue	Period-to-date revenue - The cumulative amount of revenue for the period. This is booked order in the CRM schema for actual revenue.
Response Count	The sum of positive responses for the period.
Cost Per Response	Total approved budget amount for the campaigns for the activity divided by the number of cumulative responses.
Revenue Per Response	The sum of the revenue for that period divided by the number of responses for that period.
Response Lead Count	Total number of leads created against the campaigns during the period. This excludes dead leads.
Cost per Lead	The sum of Period-to-date cost divided by the sum of lead count.
Revenue per Lead	The sum of the revenue for that period divided by the sum of leads for that period.
Order Count	The number of booked orders.
Cost per Order	The total booked order amount divided by the number of orders booked.
Revenue per Order	The sum of the revenue for that period divided by the sum of orders for that period.

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions
Fixed Calculation Period	■ Data can be aggregated by period. Default is Quarter. ■ Daily - Last 24 hours (Last refresh date) ■ Weekly - Start of week to current date, up to 7 days. Week begins on a Sunday. ■ Monthly - Start of month, up to 30 days. ■ Quarterly - Start of current quarter, up to current date. ■ Yearly - Start of current fiscal year, up to current date. Examples: ■ Daily 9-Nov-01 to 10-Nov-01 ■ Weekly 4-Nov-01 to 10-Nov-01 ■ Monthly 1-Nov-01 to 10-Nov-01 ■ Quarterly 1-Sep-01 to 10-Nov-01 ■ Yearly 1-Jun-01 to 10-Nov-01

REPORT: Campaign to Order

Name

Campaigns to Orders

Business Purpose

This report summarizes Order information per Campaign.

Columns

Campaign Name	Campaign name.
Total Responses	Sum of responses, collected in Interaction History, based on the aggregate.
Converted to Leads	Sum of responses converted to a lead based on aggregate. ((open + closed leads) / total responses) * 100
Open Leads	Total number of leads created against the campaigns which are open during the period.
Close Leads	Sum of Leads closed based on aggregate. All closed leads regardless of qualified/unqualified.
Converted to Orders	Sum of Leads converted to orders based on aggregate. ((total orders of all statuses) / (open + closed leads)) * 100
Orders Booked	The dollar amount of the sum of orders booked based on the aggregate.

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or ‘All’ for all Regions. Default is set to ‘All’.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or ‘All’ for all Country. Default is set to ‘All’.
Business Unit	Lists all business units defined in HR Organizations with type ‘BU’. User can choose a business unit or ‘All’ for all business units. . Default is set to ‘All’
Scale by	Scale the amount columns by user choice. Available options: ▪ Units ▪ Hundreds ▪ Thousands ▪ Millions

REPORT: Campaigns by Activity

Name

Campaigns by Activity

Business Purpose

This report summarizes Campaign information per Activity.

Columns

Activity	Activity name.
Count	This is the number of Campaigns associated to this activity during the period.
Target Audience	The total target audience for this Activity during the period.
Lead	Total number of leads created against the campaigns during the period. This excludes dead leads.
Lead Amount	The sum of Lead amount of all leads created against the campaigns during the period.
Opportunities	Total number of opportunities created against the campaigns during the period.
Opportunity Amount	The sum of opportunity amount of all opportunities created against the campaigns during the period.

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.

Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

REPORT: Campaigns by Budget Amount

Name

Campaigns by Budget Amount

Business Purpose

This report summarizes Budget information per Campaign.

Columns

Campaign Name	Campaign name.
Activity Type	Activity Type name.
Activity	Activity name.
Business Unit	Business Unit name.
Approved Budget Amount	The total budget amount allocated to the Activity by approved budget lines
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Activity

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.

Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

REPORT: Campaigns by Leads and Opportunities

Name

Campaigns by Leads and Opportunities

Business Purpose

This report summarizes Lead and Opportunity information per Campaign.

Columns

Campaign Name	Campaign name.
Targeted Customers	The total target audience for this Activity during the period.
Lead	Total number of leads created against the campaigns during the period. This excludes dead leads.
Lead Amount	The sum of Lead amount of all leads created against the campaigns during the period.
Opportunities	Total number of opportunities created against the campaigns during the period.
Opportunity Amount	The sum of opportunity amount of all opportunities created against the campaigns during the period.

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

REPORT: Event Cost and Revenue

Name

Event Cost and Revenue

Business Purpose

This report summarizes Cost and Revenue information per Event.

Columns

Event	Event Name
Total Cost	Period-to-date cost - The cumulative amount of the approved budget for the period.
Total Revenue	Period-to-date revenue - The cumulative amount of revenue for the period. This is booked order in the CRM schema for actual revenue.
Registration Count	The sum of registrations for the period.
Cost per Registration	Total approved budget amount for the events for the activity divided by the number of cumulative registrations.

Revenue per Registration	The sum of the revenue for that period divided by the sum of registrations for that period.
Lead Count	Total number of leads created against the campaigns during the period. This excludes dead leads.
Cost per Lead	The sum of Period-to-date costs divided by the sum of Lead Count.
Revenue per Lead	The sum of the revenue for that period divided by the sum of leads for that period.
Order Count	The number of booked orders.
Cost Per Order	The total booked order amount divided by the numbers of orders booked.
Revenue per Order	The sum of the revenue for that period divided by the sum of orders for that period.

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

Fixed Calculation Period	Data can be aggregated by period. Default is Quarter. ■ Daily - Last 24 hours (Last refresh date) ■ Weekly - Start of week to current date, up to 7 days. Week begins on a Sunday. ■ Monthly - Start of month, up to 30 days. ■ Quarterly - Start of current quarter, up to current date. ■ Yearly - Start of current fiscal year, up to current date. Example: Current date is November 10, 2001 ■ Daily 9-Nov-01 to 10-Nov-01 ■ Weekly 4-Nov-01 to 10-Nov-01 ■ Monthly 1-Nov-01 to 10-Nov-01 ■ Quarterly 1-Sep-01 to 10-Nov-01 ■ Yearly 1-Jun-01 to 10-Nov-01

REPORT: Event Cost, Revenue and ROI

Name

Event Cost, Revenue and ROI

Business Purpose

This report summarizes Costs, Revenues and Return on Investments per Event.

Columns

Actual Cost	Period to-date cost - The cumulative amount of the approved budget for the period.
Forecasted Cost	From Metrics value. Summarize schedule cost and the parent cost.
Cost Variance	((actual – forecast) / forecast) * 100
Actual Revenue	Booked order amount in Quoting/Order Capture.
Forecasted Revenue	From Metrics value. Summarize schedule revenue and the parent revenue.
Revenue Variance	((actual – forecast) / forecast) * 100
Actual ROI	((actual revenue - actual cost) / actual cost) * 100

Forecasted ROI	((forecast rev - fore cost) / forecast cost) * 100
ROI Variance	((actual - forecast) / forecast) * 100

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions
Period	Data can be aggregated by period. Default is Current Quarter. ■ A list of last 4 fiscal Years ■ A list of last 16 quarters

REPORT: Events by Budget Amount

Name

Events by Budget Amount

Business Purpose

This report summarizes Budget information per Event

Columns

Event	Event name.
Type	Event Type name.

Business Unit	Business Unit name.
Approved Budget Amount	The total budget amount allocated to the Event by approved budget lines.
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Event.

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

REPORT: Events by Event Type

Name

Events by Event Type

Business Purpose

This report summarizes Budget and Event information per Event Type.

Columns

Event Type	Event Type name.
Number of Events	The number of Events associated with this Event Type.

Approved Budget Amount	The total budget amount allocated to the Event by approved budget lines.
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Event.
Registrants	The sum number of registrations for this event type for the period.
Attendees	The sum number of attendees for this event type for the period.
Cancellations	The sum number of cancellations for this event type for the period.

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

REPORT: Events by Leads and Opportunities

Name

Events by Leads and Opportunities

Business Purpose

This report summarizes Leads and Opportunities information per Event.

Columns

Event	Event name.
Leads	Total number of leads created against the campaigns during the period. This excludes dead leads.
Lead Amount	The sum of Lead amount of all leads created against the campaigns during the period.
Opportunities	Total number of opportunities created against the campaigns during the period.
Opportunity Amount	The sum of opportunity amount of all opportunities created against the campaigns during the period.

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ▪ Units ▪ Hundreds ▪ Thousands ▪ Millions

REPORT: Events by Registrants

Name

Event by Registrants

Business Purpose

This report summarizes Registration information per Event

Columns

Event Name	Event name.
Registrants	The sum number of registrations for this event type for the period.
Attendees	The sum number of attendees for this event type for the period.
Cancellations	The sum number of cancellations for this event type for the period.

Parameters

Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Country. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. . Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ▪ Units ▪ Hundreds ▪ Thousands ▪ Millions

CHART: Budget Utilization by Business Unit

Name

Budget Utilization by Business Unit

Business Purpose

This chart summarizes the top ten Budgets by Business Unit.

Columns

Budget	Budget information.

Business Unit	Business Unit name.

Parameters

	No parameters available at this time.

CHART: Budget Utilization by Category

Name

Budget Utilization by Category

Business Purpose

This chart summarizes the top ten Budgets by Category.

Columns

Budget	Budget information.
Category	Category name.

Parameters

	No parameters available at this time.

CHART: Campaigns by Leads

Name

Campaign by Leads

Business Purpose

This chart summarizes the top ten Campaigns by Leads.

Columns

Campaign	Campaign name.

Leads	The number of leads to Campaign..

Parameters

	No parameters available at this time.

CHART: Campaign by Opportunity

Name
Campaign by Opportunity

Business Purpose
This chart summarizes the top ten Campaigns by Opportunities.

Columns

Campaigns	Campaign Name
Opportunities	Opportunities

Parameters

	No parameters available at this time.

CHART: Events by Attendance

Name
Events by Attendance

Business Purchase
This chart summarizes the top ten Events by Attendance.

Columns

Events	Event name.

Attendance	The number of attendees to the Event.

Parameters

	No parameters available at this time.

CHART: Events by Registrations

Name
Events by Registrations

Business Purpose
This chart summarizes the top ten Events by Registrations

Columns

Event	Event name.
Registration	The number of registrations to the Event.

Parameters

	No parameters available at this time.

CHART: Events by Leads

Name
Events by Leads

Business Purpose
This chart summarizes the top ten Events by Leads

Columns

Event	Event name.

Leads	The number of leads to Event.

Parameters

	No parameters available at this time.

CHART: Leads and Cost per Lead

Name

Leads and Cost per Lead

Business Purpose

This Chart summarizes the number of Leads to their Cost.

Columns

Cost Per Lead
Leads

Parameters

	No parameters available at this time.

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