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Send Us Your Comments

Oracle Marketing Implementation Guide, Release 11*i*

Part No. B10588-01

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 postal service:

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Oracle Marketing Documentation Manager
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Redwood Shores, CA 94065
U.S.A.

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

Intended Audience

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- The Oracle Marketing application.

If you have never used Oracle Marketing, Oracle suggests you attend one or more of the Oracle Marketing training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See "[Other Information Sources](#)" for additional Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Marketing.

- Chapter 1: Provides an overview of Oracle Marketing, its features and functions, and features new in this release.
- Chapter 2: Describes how to implement required and optional dependencies, a prerequisite step in an Oracle Marketing implementation.
- Chapter 3: Provides procedural tasks for implementing basic Oracle Marketing.

- Chapter 4: Provides procedural tasks for implementing eMerchandising.
- Chapter 5: Provides procedural tasks for implementing Data Mining.
- Chapter 6: Provides procedural tasks for implementing Trade Management.
- Chapter 7: Provides procedural tasks for implementing Market Intelligence for Oracle Marketing.
- Chapter 8: Provides procedural tasks for implementing Marketing Metrics.
- Appendix A: Oracle Marketing profile options.
- Appendix B: Summary of Lookups.
- Appendix C: Oracle Marketing Concurrent Programs.
- Appendix D: List Import Fields.
- Appendix E: Seeded User Statuses.

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/>.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Marketing.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Marketing shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Marketing.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Marketing (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Marketing User's Guide

This document provides user information for Oracle Marketing implementation. This document includes user procedures for creating campaigns, budgets, lists, list import, data sources, eMerchandising.

Oracle iStore Implementation Guide

This document provides detailed information for an Oracle iStore implementation. Details include: Administration setups, Implementation tasks, and integration points.

Oracle Fulfillment Services Implementation Guide

This document provides detailed information for an Oracle Fulfillment Services implementation. Details include: Administration setups, Implementation setups, and implementation tasks are provided.

Oracle Advanced Pricing User Guide

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

Oracle Business Intelligence System Implementation Guide

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

Oracle Discoverer Administration Guide

This document provides general information on the set up and administration of Oracle Discoverer. Includes features, terms, and information on how to use Oracle Discoverer with Oracle Applications.

Oracle Scripting Implementation Guide

This guide provides details for an Oracle Scripting implementation project. Oracle Marketing implementors will need to refer to this guide as it relates to integrating scripts for Oracle Marketing purposes.

Oracle Sales Online Implementation Guide

This document brings together all of the information you need to implement three Oracle sales products: Oracle Field Sales/Wireless, Oracle Sales Online, and Oracle TeleSales. It includes implementation and administration parameters for each task.

Oracle General Ledger User Guide

This guide provides information on setting up Oracle General Ledger, a mandatory dependency for Oracle Marketing budgets.

Oracle Inventory User's Guide

This guide provides information on setting up Oracle Inventory, a mandatory dependency for Oracle Marketing products and collateral.

Oracle Order Management User's Guide

This guide provides information on setting up Pricing, a mandatory dependency for Oracle Marketing Offers and Products.

Oracle Receivables User Guide

this guide provides information on setting up Oracle Receivables, a mandatory dependency for Trade Management and TCA customer data.

Using Oracle HRMS - The Fundamentals

This guide provides information on using Oracle Human Resources, a mandatory dependency for Oracle Marketing.

Oracle Universal Work Queue Implementation Guide

This document contains the information you need to understand and implement Oracle Universal Work Queue. When implementing Marketing lists with Telesales, and Oracle Marketing implementor will need to reference this guide.

Oracle9i Database Utilities

This document provides information on SQL* Loader - needed for an Oracle Marketing Data Mining implementation.

Oracle Data Mining Administrator's Guide

This document describes how to install the Oracle9i Data Mining (ODM) software and how to perform other administrative functions common to all ODM administration on both UNIX and Windows platforms. It will be necessary to reference this guide when implementing Oracle Marketing Data Mining.

Oracle CRM Application Foundation Implementation Guide

This guide provides an overview of what you need to have installed, implemented, and verified before implementing the Oracle Marketing. Some foundation components are required, others are optional, see specific Oracle Marketing implementation tasks for details.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

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 concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and Event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Marketing. This manual details additional steps and setup considerations for implementing Oracle Marketing with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Marketing with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Marketing.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business Events and Event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Marketing implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Marketing 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 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 Oracle8i server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* 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 Oracle*MetaLink*, you can obtain information and advice from technical libraries 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 Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/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: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus[®], Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Introduction

This chapter describes Oracle Marketing features, benefits, functional areas, and integration points.

Topics include:

- [Section 1.1, "Oracle Marketing Product Overview"](#)
- [Section 1.2, "Oracle Marketing Key Benefits"](#)
- [Section 1.3, "Functional Areas"](#)
- [Section 1.4, "New in this Release"](#)

1.1 Oracle Marketing Product Overview

Oracle Marketing automates the entire marketing process from campaign planning, budget management, and list creation to execution and analysis. It enables marketers to:

- Go to market faster with complete campaign management
- Be more cost-effective with complete marketing control
- Execute targeted marketing with complete marketing analysis

Complete Campaign Management

Campaign management in Oracle Marketing focuses on planning, coordinating, and executing multi-channel marketing campaigns (via e-mail, direct mail, Web sites, phone, and other indirect marketing media). Oracle Marketing offers real-time personalization and product recommendations as part of a Web campaign, or as eMerchandising in conjunction with a Web store such as Oracle iStore.

Oracle Marketing also offers a sophisticated capability to generate target lists, create market segments, and manage imports from other data sources. In addition, Oracle Marketing helps manage marketing event logistics such as setting up agendas, venues, and registration rules for seminars, trade shows, and other marketing-related events.

Complete Marketing Control

Oracle Marketing helps provide the right level of control by automating processes and workflows. Not only can workflows and approvals be easily configured for various marketing models and different occasions, but Oracle Marketing is also very flexible in terms of changing the control elements of the application (for example, which fields are locked or mandatory).

Budget and cost management are essential to the success of a marketing operation. Oracle Marketing offers comprehensive budget and cost management functionality to help organizations keep costs under control. With its seamless integration with the Oracle E-Business Suite, Oracle Marketing provides the ability to create and modify product and pricing information, enabling further control over the more strategic aspects of marketing.

Complete Marketing Analysis

Analysis is often the first stage in a marketing cycle. The Oracle solution provides seeded marketing reports as well as flexible metrics that can be configured to measure performance based on any data or system. Homepage marketing

intelligence reports and charts can be personalized to provide a centralized view of key marketing data.

1.2 Oracle Marketing Key Benefits

Oracle Marketing enables an enterprise to achieve “Single Marketing Reality”— the ability to plan and execute marketing programs from Campaign to Order to Cash. It 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 takes you beyond simple campaign planning and execution; it empowers you to measure and to achieve true marketing ROI.

Oracle Marketing offers the following benefits:

- **Automated Processes:** With centralized processing and approval management, Oracle Marketing enables an organization to focus more on marketing and less on logistics.
- **Multi-Channel Execution:** Oracle Marketing’s seamless integration with other products in the Oracle E-Business Suite enables a marketer to plan and execute campaigns across all channels and marketing media.
- **Increased Velocity:** Improved personal productivity, team collaboration, and information sharing enables marketers to plan and execute campaigns in an accelerated time frame to gain a competitive advantage.
- **Improved Profitability:** Campaign and offer tracking across the Oracle E-Business Suite enables marketers to pinpoint the revenue generated by each marketing effort.
- **Maximize Return on Investment (ROI):** Since cost and revenue tracking is performed on a real-time basis, marketers adjust campaigns at any time to maximize the marketing ROI.

1.3 Functional Areas

The Oracle Marketing application is composed of several functional areas. The implementation and use of each functional area depends on your business requirements. Functional areas include:

Marketing

Core Oracle Marketing functionality provides campaign management, event planning and management, budgeting and cost management, list management, deliverables management, product and price list management, workflow and approvals, personalization, and self-service administration.

Marketing Intelligence

Marketing Intelligence provides comprehensive reports for marketing professionals primarily for the purposes of planning, performance monitoring, and analysis. During the planning cycle, marketing organizations should carefully study the results of their past activities. This provides the basis for any changes they will make to the upcoming activities, as well as the benchmark on which they can forecast their returns in the future. During the execution stage, monitoring performance on a daily basis enables marketing professionals to react to their market needs, test their forecast assumptions and make changes if necessary. Throughout all business cycles, analysis needs to be conducted and analysis always starts with reports that contain accurate, timely data.

eMerchandising

eMerchandising functionality enables a Web marketing channel. Web content, such as Web advertisements, Web offers, and product recommendations can be created and then displayed on Oracle iStore or any Web store.

Data Mining

Data Mining provides the ability to create predictive models of customer and prospect behavior based on historical data. You can then use these models to predict which segments to target in future campaigns. By intelligently targeting only those prospects with a high propensity to exhibit a desired behavior (e.g., respond to a marketing campaign), you can increase marketing ROI by decreasing the number of contacts and increasing the response rate.

Trade Management

Designed for the consumer goods industry, Oracle Marketing's Trade Management option is B2B functionality that can be used to control costs related to promotions, track deals made with retailers, distributors, or partners, and process all claims and deductions. When a claim is made, Trade Management gives businesses a fast, easy, efficient way to research the claim, append to the earnings from the original offer (or deal if promotional related), and recognize cost savings by identifying invalid claims or deductions.

Note: Trade Management is an Oracle Marketing option that must be purchased separately.

Leads Management

Leads Management enables users to capture, evaluate, and distribute sales leads for follow up. When implemented, Oracle Marketing users can perform lead rules engine setup and maintenance as well as run operational reports. See the *Oracle Leads Management Implementation and Administration Guide* for more information.

1.4 New in this Release

Oracle Marketing and its component modules include numerous new features and enhancements in this release. The following sections describe new feature and enhancements that have been made in release 11.5.9:

- [Section 1.4.1, "Oracle Marketing Enhancements"](#)
- [Section 1.4.2, "eMerchandising Enhancements"](#)
- [Section 1.4.3, "Data Mining Enhancements"](#)
- [Section 1.4.4, "Trade Management Enhancements"](#)

Note: This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.9 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult MetaLink for relevant product patches and documentation.

1.4.1 Oracle Marketing Enhancements

Oracle Marketing's core functionality has been enhanced in several areas in release 11.5.9. The following sections describe key enhancements to core functionality:

- [Section 1.4.1.1, "Usability Enhancements"](#)
- [Section 1.4.1.2, "Enhanced Click-Through Destinations and Response Management"](#)
- [Section 1.4.1.3, "Enhanced Integration with Oracle Scripting/Survey"](#)

- [Section 1.4.1.4, "Marketing Calendar"](#)
- [Section 1.4.1.5, "Event Management Enhancements"](#)
- [Section 1.4.1.6, "Audience Management Enhancements"](#)
- [Section 1.4.1.7, "Additional Performance Metrics"](#)

1.4.1.1 Usability Enhancements

Release 11.5.9 includes the following usability enhancements:

- **Marketing Administration Menu:** This feature provides a clear, concise list of menu items pertaining only to Marketing-related administration tasks.
- **Essential and Optional Groupings:** This enhancement provides the user with a means to quickly identify which steps in a process are essential and which are optional. This grouping is implemented via a user profile option and is configurable from the Administration Custom Setup screen.
- **Intuitive Approval Request Processing:** Previously, the approval process for marketing objects was initiated through the Update button from the object's details page. In this release, a "Submit for Approval" button makes this process more intuitive. Enhanced integration with the Oracle E-Business Suite approvals framework lets users review the summary of their request actions and object approver hierarchies and then confirm submission for approval or cancel the request. Integration with the approvals framework also allows for reviewing the progress of approval requests.
- **Context-Sensitive Buttons:** The Oracle Marketing UI has been re-worked in this release to expose only those buttons that are relevant to a process. For example, in previous releases, the Budget Sources page showed multiple buttons (e.g., Create Request, Create Transfer, Update, and Restore). In this release, only those buttons that are relevant to the task at hand are shown.
- **Standardized Date Format:** A standardized date format (YYYY-MM-DD) has been enforced in this release to provide consistency throughout the application.
- **Breadcrumbs:** "Breadcrumbs" or user navigation trails have been added to key task flows in this release to help users better identify the stage of the process or task that they are performing.
- **Improved Messages and Tip Text for Key Flows:** Key process flow error messages, tip text, UI instructions, and confirmation messages have been revised and clarified in this release.

1.4.1.2 Enhanced Click-Through Destinations and Response Management

The click-through destination framework, already available through eMerchandising, has been enhanced as follows:

- **Content Authoring in e-Mail Campaign Schedules:** Campaign managers now have access to the same easy-to-use interface to create structured URLs for both Internet and e-Mail Campaign Schedules.
- **Improved Mapping with iStore Deep Linking:** Oracle Marketing iStore-specific actions (e.g. "Go to Product details," and "Add to shopping cart") leverage iStore deep linking functionality and thus offer more granular parameters (e.g., target specialty store, unit of measure, quantity).
- **New "Go to Survey" Action:** Added to allow marketers to link a Campaign Schedule to a Web script or survey.
- **Tracking:** New Response Management functionality provides marketers who create a click-through destinations with the ability to track and report on customer responses. When tracking is enabled, customer responses (i.e., a person clicking on a URL or Web posting) are recorded as an interaction in the Oracle E-Business Suite Interaction History module. Responses to campaign activities as well as the behavior of the customers during the interaction can be tracked and recorded in order to provide feedback to marketers in designing more effective campaigns.

1.4.1.3 Enhanced Integration with Oracle Scripting/Survey

The integration between Oracle Marketing and Oracle Scripting provides marketing managers with the ability to follow-up on the campaigns they design with a scripted flow of interactions (either through the Web or a call-center). Newly seeded scripts focusing on event registration, lead creation, and customer data acquisition have been added as part of the enhanced integration. Scripting administrators can deploy these scripts/surveys as-is or modify them using Oracle Scripting Author. Marketing users then have the ability to associate a script or survey to a Campaign Schedule, thus ensuring that all the customers who respond to the Campaign Schedule will enter the script or survey.

1.4.1.4 Marketing Calendar

The marketing calendar is a generic calendar available to all marketing users. The calendar displays objects based on status and a time range. Objects include Campaign Schedules, Event Schedules and One Off Events. Users can access object data on the calendar through metadata reports.

1.4.1.5 Event Management Enhancements

Event management functionality has been enhanced in the following ways:

- Enhanced search capability for venues based on Capacity, Country, or State
- Enhanced Event search capability
- Ability to update the attended flag for Event registrants

1.4.1.6 Audience Management Enhancements

Audience management functionality has been enhanced in the following ways:

- **Support for Segments as Target Groups:** This feature empowers the marketer to generate a target group based on dynamic criteria for triggered Campaign Schedules. By defining the dynamic criteria as a segment and attaching this segment to a target group, marketers can dynamically create the target group. Since this target group is only generated when the trigger condition is met, marketers can now execute their Campaign Schedule to the right set of customers that meet the segment criteria at the appropriate point in time.
- **Additional TCA Destination Fields within List Import:** The list import process provides additional data attributes for marketers to map their external data source fields to target fields within the Oracle Trading Community Architecture (TCA). Target fields added to list import are Fax Number and fifteen user-defined flexfields at both the organization and organization site level. These flexfields can be used to capture any additional information specific to the customer (e.g., Internal Web Site, Site Code, etc.). These additional TCA destination fields enable marketers to import supplemental customer information for use within Oracle Marketing and other applications in the Oracle E-Business Suite.
- **Support for Additional Fields within List Entries Screen:** The existing List Entries screen is enhanced to include additional columns for Title, Gender, and Language for both B2B and B2C customers. Marketers have the flexibility to either display or hide these columns on the List Entries Screen via the personalize search option. Marketers can also download this additional information to a comma separated value (.csv) file to fulfill any subsequent marketing activity.
- **XML Support for List Import:** The list import process has been enhanced to provide marketers with the ability to import lists from an XML file into Oracle Marketing. Using this functionality, marketers have the flexibility to map and import data from an external source, either using a comma separated value file

(.csv) or an XML file. Marketers can import list data from XML files for both B2B and B2C customers.

1.4.1.7 Additional Performance Metrics

Release 11.5.9 of Oracle Marketing provides additional 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 this release have been expanded to include the following:

- Campaign Responses
- Number of Orders generated by Campaigns and Events

For each of these seeded metrics, the "actual" column is automatically updated in the Metrics side navigation for Campaigns and Events.

1.4.2 eMerchandising Enhancements

The following enhancements have been added to eMerchandising functionality in release 11.5.9:

- **Web Offers:** A new content type has been added to eMerchandising postings. In addition to Web advertisements and product recommendations, Internet marketing managers can now create postings that return Web offers. When a customer is shopping in an iStore specialty store, the eMerchandising recommendation engine can perform the following tasks:
 - Dynamically select offers previously created in Oracle Marketing based on the logic defined in a posting.
 - Verify that the offer is applicable to the particular context, based on the customer and the content of the shopping cart, as defined in the offer criteria.
 - Display the image(s) associated to the valid Web offers on the Oracle iStore page.
- **Personalization on Affiliate Web Sites:** An important enhancement has also been made to affiliate posting functionality. It is now possible to pass a customer identifier as part of this external call to the eMerchandising engine, which will enable personalization of Web advertisements on external Web sites.

- **Titles for Placement Bins:** Placements have been enhanced to include a "Display Name" that will be displayed as a title for the placement bin. This allows eMerchandising users to create titles like "We also recommend..." or "You may also be interested in..." or any other bin title they may want to display on top of the Web advertisement or product recommendation.

1.4.3 Data Mining Enhancements

In release 11.5.9, Data Mining functionality has been enhanced as follows:

- **Attribute Importance Chart:** Oracle Marketing's native integration with Oracle 9i Data Mining is enhanced with an attribute importance calculation that evaluates the potential predictive power of all data elements analyzed during modeling. The results are presented on a chart showing the customer attributes that have the highest predictive power. These attributes could include job role and industry type for a B2B customer model, and age, income, and marital status for a B2C customer model.
- **User-Defined Data Sources:** In addition to leveraging Oracle's comprehensive customer model, marketers can use imported lists and user-defined data sources to define predictive models. This feature provides greater data-mining flexibility and enables integration with pre-existing data warehouses and industry-specific data models (such as those used for financial services and telecommunications). Marketers can decide which attributes to use for modeling and scoring, specify the desired value ranges within each attribute (for example, age buckets or income ranges), and define the desired target field (with corresponding value ranges) for each model type/data source combination.
- **Custom Model Type:** In addition to the existing Response (direct mail, e-Mail, telemarketing) and Loyalty/Retention predictive model types, a new custom model type is provided to enable marketers to predict user-defined customer behaviors. The custom model type can be used to predict the value of any customer data attribute in the Oracle customer model or in an alternative customer model. For example, marketers can set up a custom model to predict financial risk based on a credit score attribute, or a custom model to predict likelihood of high credit card balances vs. low balances.
- **Enhanced Models/Scoring Runs:** The robustness of building a predictive model and executing a scoring run is improved with the following enhancements:

- Three new statuses have been added for both Models and Scoring Runs: Failed, Invalid and Previewing. These new status values provide a more accurate reflection of the Model or Scoring Run status.
- Data Source and Target Field columns have been added to the overview screens for Models and Scoring Runs. Users can now view this information directly without drilling down to the Model or Scoring Run details.
- Improved error handling to provide marketers with additional information on any exceptions that are encountered.

1.4.4 Trade Management Enhancements

The following sections describe enhancements and new functionality that have been added to Trade Management in release 11.5.9:

- [Section 1.4.4.1, "Trade Planning and Execution Enhancements"](#)
- [Section 1.4.4.2, "Trade Management Budgets Enhancements"](#)
- [Section 1.4.4.3, "Trade Management Claims Enhancements"](#)

1.4.4.1 Trade Planning and Execution Enhancements

The following new features and enhancements have been made for trade planning and execution functionality:

- **Manufacturer's ROI Calculator:** The Manufacturer's ROI Calculator is designed to provide the trade user with a multi-functional planning tool that aids in the initial analysis, strategic planning, and execution of any promotional offer or activity. Additionally the Manufacturer's ROI Calculator serves as a tracking and monitoring tool for revenue and costs for active promotional offers.
- **Volume Offer Type:** Volume offers provide manufacturers with the ability to easily alter the original conditions (e.g., discount terms, product groups involved) of a volume offer while the offer is still active. The "Adjustment" will consider the business activity that preceded the change and will make the necessary adjustments regarding the discount or incentive.
- **Scan Data Offer Type:** The Scan Data offer type supports the acceptance, validation, and reconciliation of manufacturer sponsored coupon, rebate and POS promotions. These manufacturer sponsored coupons or rebates are redeemed at retail typically by the end consumer, then processed through third-party clearing house who in turn passes the data to the manufacturer who makes payment to the retailer. Trade Management has the ability to allow the

acceptance of such scan data from a third-party source. The collected data may then be researched, verified, and resolved so that payment to the appropriate retailer may be made and the open liability can be settled.

- **Offer Defaults:** This enhancement provides trade organizations with the ability to establish various offer-relevant default values during initial setup. The ability to establish default values assures the trade organization that accurate information, such as discount parameters, are accurately passed to Oracle Advanced Pricing thus protecting ROI and reducing the amount of customer claims which are typical by-product pricing errors.
- **Quick Offer Types:** Quick offer types simplify the offer creation, set-up, and execution process. Quick offer types, such as Trade Management's "Trade Deal," allow users to expediently enter important offer details, including budget requests and market eligibility rules, on one screen, thus minimizing the amount time necessary to execute an offer.
- **Offer Summary and Search Enhancements:** Enhanced offer search capabilities and summary page refinements allow the trade user to search for and view promotional information with additional filter options. For example, the trade user may now search for and view promotional offers for a specific customer or customer type via Territory, List, Segment or Buying Group.

The exposure of budget related columns at the offer summary level enables the user to evaluate spending trends and budget status for an active promotional offer. The inclusion of such information provides an easy reference tool for the trade user and alleviates the need for multiple clicks to access budget updates and status.

- **Offer Copy:** Copy offer functionality allows the user to simply "re-create" a past or currently active promotional offer and its corresponding parameters (i.e., date ranges, products involved, and discount levels). Once "re-created" the user may enter new markets and new products or adjust discount levels and date ranges.
- **Offer Security:** This release also includes the option of applying security for offers. The security feature is designed to allow only users who create or who are owners of a promotional execution the ability to view and/or update parameters of an offer.

1.4.4.2 Trade Management Budgets Enhancements

The following enhancements have been added to Trade Management budgeting functionality:

- **Fully Accrued Budget Enhancement:** In release 11.5.9, multiple product or product family parameters can be used as the basis for calculating each fully accrued budget. Companies can now specify, within one fully accrued budget, different accrual rates for different products/product families. This makes the administration of such live funds easier and more flexible.
- **Top Down, Bottom Up Budgeting:** This enhancement provides sales management with an automated tool to allocate budgets based on prior year sales as well as providing sales representatives with a channel to submit their budget requests based on their future forecasts. This provides companies with an efficient way to manage the time-consuming budget process and to facilitate communication between management and sales people at all levels in the sales hierarchy.
- **Offer Adjustment Support:** New functions in release 11.5.9 include the support of all offer adjustments including Back-Dated Offers, Volume Offers, and Scan Data Offers.
 - In support of volume offers, budget adjustment functionality performs the accurate calculation of accruals based on the cumulative sales performance of a customer. Adjustments can also be made retroactively, if desired.
 - In support of scan data offers, budget adjustment functionality performs the initial accrual postings during the forecast stage and will perform and adjustments necessary during the claim resolution stage.
- **Spreading Lump Sum Offer Postings:** Prior to release 11.5.9, posting both to the Budget and to General Ledger was done once and only when the offers started. This new option allows companies to choose to divide the total amount into smaller amounts and create postings periodically.
- **Budget Roll Up View:** This feature gives an organization a high-level view of all budget activities and usages summed up to each level.

1.4.4.3 Trade Management Claims Enhancements

The following enhancements have been made to the Claims module of Trade Management:

- **Actions Template Default:** New in 11.5.9 is the default of actions templates containing series of tasks to guide the research and resolution process of a claim. This gives claims departments a comprehensive project management tool.

- **Public Claims API:** This public API provides another alternative to create claims and to allow companies to integrate Trade Management's Claims module with any system.
- **Mass Create:** The ability to mass create lets users create multiple claims quickly on one screen. Due to the massive amount of claim and deduction data that many businesses encounter, this tool can significantly expedite the claim resolution processes.
- **Team Access:** This feature enables multiple users or groups have access to each claim, letting companies manage scenarios where a definite claim owner may not be easily determined and collaboration is necessary.
- **Related Documents Side Navigational Link:** This feature automatically searches for and gives claim users a summary view of all claims with similar or same customer debit memo numbers, thus allowing them to identify duplicate or invalid customer claims more quickly.
- **RMA Workflow:** Return Materials Authorization (RMA) settlement handles claims scenarios due to customers returning goods that were shipped to them. This enhancement allows a company to resolve a claim or deduction by creating an RMA and/or associating a credit memo derived from existing RMA with the appropriate claim or deduction.
- **Invoice Line Credit:** In addition to providing Invoice Credits (crediting the entire invoice), Trade Management now provides Invoice Line Credits. Since an invoice may contain multiple lines each with different products and since claims or deductions may occur for different products, crediting an invoice at the line level enables accurate tracking and accounting of such problems.
- **Settlement by Creating Tax Credits:** Since claims and deductions can arise due to errors in calculating taxes during the invoicing processes, settlement via tax credits allows claims departments to settle claims by correcting such tax errors.
- **Third-Party Accrual:** Third party accrual allows user to credit customers accrual points based on the orders that they made through a third-party such as a wholesaler. This gives the merchant a better way to keep track of customer order history.

Mandatory Dependencies

This chapter covers how to implement mandatory dependencies required for an Oracle Marketing implementation project.

Topics include:

- [Section 2.1, "Mandatory Dependency Overview"](#)
- [Section 2.2, "Technology Requirements"](#)
- [Section 2.3, "Dependency Implementation Task Overview"](#)
- [Section 2.4, "Setting Up Oracle CRM Technology Foundation"](#)
- [Section 2.5, "Setting Up Application Object Library"](#)
- [Section 2.6, "Setting Up General Ledger"](#)
- [Section 2.7, "Setting Up Oracle Human Resources"](#)
- [Section 2.8, "Setting Up Oracle Inventory"](#)
- [Section 2.9, "Setting Up Oracle Receivables"](#)
- [Section 2.10, "Setting Up Oracle 1-to-1 Fulfillment"](#)
- [Section 2.11, "Creating Users"](#)
- [Section 2.12, "Optional Enhancements"](#)
- [Section 2.13, "Optional Integrations"](#)

2.1 Mandatory Dependency Overview

Oracle Marketing mandatory dependencies, optional integrations, and optional enhancements range from applications that supply an underlying structure for Oracle Marketing to those that extend its functionality and capabilities.

- **Mandatory Dependencies:** Oracle products that provide underlying technology stack, schema, and structure. Implementing these dependencies is required and must be complete before beginning an Oracle Marketing implementation.

For example, Oracle Inventory provides a repository for products associated with Marketing Campaigns and Offers. Therefore, Oracle Inventory is integral to the functioning of Oracle Marketing, as a result, it is considered a mandatory dependencies.

- **Optional Integrations:** Applications implemented in addition to Oracle Marketing. Any application that is not part of the Oracle Marketing and Partners suite.

For example, Oracle iStore can be implemented along with Oracle Marketing. This is an optional enhancement that enables online web execution of Marketing Campaigns. This functionality is optional, is not required for Oracle Marketing to function properly, and is therefore considered an optional integration.

- **Optional Enhancements:** Additional modules that are implemented along with Oracle Marketing that are part of the Oracle Marketing and Partners suite.

For example, Trade Management is an optional component of the Oracle Marketing application. Trade Management enables advanced budgeting, claims, claims settlement, and trade planning. This functionality is not required for a basic Oracle Marketing implementation to function properly.

2.2 Technology Requirements

The following table lists the prerequisite technology requirements for an Oracle Marketing implementation.

Table 2–1 Technology Requirements

Technology
Oracle 8 Enterprise Edition Release, version 8.1.7.2
Oracle WebDB, version 2.2.2.1

Table 2–1 Technology Requirements

Technology
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)
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.

2.3 Dependency Implementation Task Overview

The applications listed as mandatory must be implemented for Oracle Marketing to function properly. Setups are generally partial and limited to the basic functions necessary for Oracle Marketing to function properly.

For example, Oracle Inventory is a mandatory dependency for Oracle Marketing products, however it is not required that you completely implement Oracle Inventory. You only need to implement it for Oracle Marketing purposes, therefore the setups are partial.

The applications listed as optional are required only if the functionality provided is necessary as defined by the business requirements of the implementation.

The following table lists the mandatory and optional dependencies for Oracle Marketing.

Table 2–2 Dependency Task Overview

Step	Mandatory/Optional	Reference
1. Set Up Oracle CRM Technology Foundation	Mandatory	Section 2.4, "Setting Up Oracle CRM Technology Foundation"
2. Set Up Oracle Application Object Library	Mandatory	Section 2.5, "Setting Up Application Object Library"
3. Set Up Oracle General Ledger	Mandatory	Section 2.6, "Setting Up General Ledger"
4. Set Up Oracle Human Resources	Mandatory	Section 2.7, "Setting Up Oracle Human Resources"
5. Set Up Oracle Inventory	Mandatory	Section 2.8, "Setting Up Oracle Inventory"
6. Set Up Oracle Receivables	Mandatory	Section 2.9, "Setting Up Oracle Receivables"
7. Set Up Oracle 1-to-1 Fulfillment	Mandatory	Section 2.10, "Setting Up Oracle 1-to-1 Fulfillment"
8. Create Implementation User	Mandatory	Section 2.11, "Creating Users"
9. Optional Enhancements	Optional	Section 2.12, "Optional Enhancements"
10. Optional Integration Points	Optional	Section 2.13, "Optional Integrations"

2.4 Setting Up Oracle CRM Technology Foundation

Oracle CRM Technology Foundation is a prerequisite for implementing any Oracle CRM module. It provides a common infrastructure upon which all CRM applications are built.

By providing a set of application components, CRM Foundation ensures that all applications interact with key business objects in a consistent manner. For detailed information about Oracle CRM Foundation see *Oracle CRM Application Foundation Implementation Guide*.

The following components provided by CRM Foundation are required for Oracle Marketing:

- Resource Manager
- Notes
- Development Tools
- Territory Manager
- Assignment Manager

- Task Manager
- Calendar (HTML and Forms-based)
- Interaction History
- 1-to-1 Fulfillment
- Escalation Manager
- Business Rule Monitor

To implement CRM Foundation for Oracle Marketing use the following procedures:

- [Section 2.4.1, "Setting Up Resource Manager"](#)
- [Section 2.4.2, "Setting Up Task Manager"](#)
- [Section 2.4.3, "Setting Up Note Types"](#)

2.4.1 Setting Up Resource Manager

Resource Manager enables Oracle Marketing to use resources regardless of where they are created. Acting as a central repository for various types of resources, groups, teams, and roles can be created.

You can import resources such as employees, suppliers, parties, or partners, created in other applications. Once imported, the resource becomes available for other applications to use.

Resource Manager enables:

- Groups
- Roles
- Role Types
- Employee Import

See the *Oracle CRM Foundation Implementation Guide* for specific procedures on setting up Resource Manager.

2.4.2 Setting Up Task Manager

Task Manager is optional for a basic implementation. All Oracle CRM products use Task Manager to manage tasks. It provides an effective mechanism for organizations to respond to customer needs in a timely manner. Using Task Manager you can create, assign, manage, sort, and prioritize a task.

If implementing task transition rules, after defining a rule and assigning it an appropriate responsibility, set the following profile:

■ **Task Manager: Default Task Status**

If no rules are assigned to a responsibility, all statuses will be displayed in the Status LOV. In this case, the Task Manager: Default Task Status does not need to be set.

To set up Task Manager use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Navigate to Functions > Profile > System.
3. In the Application field enter Oracle Marketing.
4. In the profile field enter Task Manager: Default Task S%.
The System Profile Values form opens.
5. At Site level, select a default Status (accepted, cancelled, failed, in progress, etc.)
6. Save your work.

See the table below for System Profiles and their values.

Table 2–3 Task Manager Profile Options

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.

Table 2–3 Task Manager Profile Options

Option	Required	Level	Setting	Effect/Limitation
Task Manager: Default assignee status	Optional	Application	User Defined	Specifies the default assignee status when creating or assigning a task.

The **Task Manager: Default Task Status** value must be set to the first status value defined in Task Status Transition Rule for Oracle Marketing.

This status applies to the Oracle Marketing Super User.

For more information on Tasks, see the Implementing Tasks section of the *Oracle CRM Foundation Implementation Guide*.

2.4.3 Setting Up Note Types

Setting up note types is optional. Although Oracle Notes comes with a set of predefined note types, you can create customized note types. When using Oracle Marketing, both the predefined set of notes and the customized notes are available.

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

To create customized Note Types, use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with CRM Administrator responsibility.
2. Navigate to Notes Setup> Note Type Setup.
The Application Object Library: Note Types Lookups form opens.
3. Define the new Lookup code.
4. Define the meaning.
Carefully describe the Note Type meaning. It is this description that will later be used to map the Note Type to the Marketing Object.
5. Add a short description.

6. In the tag column enter Note.
7. Save your work.
8. To associate the Note Type with specific marketing objects, use the following procedure:
 - a. Navigate to Notes Setups > Source and Note Type Mappings.
 - b. Using the Source Object LOV, select the appropriate Marketing Object that will use this Note Type. For example, Campaign Schedule.
 - c. Using the Note Type LOV, select the new Note Type created. The Note Type LOV will display the text entered as the Note Type meaning.
 - d. Select an End Date for the Note Type Mapping.
 - e. Using the Application LOV, select Oracle Marketing.
 - f. Save your work.
 - g. 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.

2.5 Setting Up Application Object Library

Oracle Applications Object Library (AOL) 11i enables a multiple language and currency setup for the Oracle Marketing implementation. After being enabled, you can determine the set of languages and currencies to be used.

For more information see *Oracle Applications Concepts* and *Oracle Applications System Administrator's Guide*.

2.6 Setting Up General Ledger

Basic accounting information for Oracle Marketing is provided by Oracle General Ledger (GL). Because Oracle Inventory requires at least one Organization and associated set of books, at least one business unit must be created in GL.

To implement GL for Oracle Marketing, use the following procedure:

- [Section 2.6.1, "Setting Up Accounting Calendar Types"](#)
- [Section 2.6.2, "Setting Up Accounting Calendar"](#)

- [Section 2.6.3, "Setting Up Marketing Calendar"](#)
- [Section 2.6.4, "Enabling Currencies"](#)
- [Section 2.6.5, "Setting Up Currency Conversion Rates"](#)
- [Section 2.6.6, "Setting Up Currency Conversion Rate Types"](#)
- [Section 2.6.7, "Creating a Set of Books"](#)

For more information about setting up General Ledger for Trade Management, see [Section 6.4.4, "Setting Up General Ledger for Trade Management"](#)

2.6.1 Setting Up Accounting Calendar Types

To set up Accounting Calendar Types use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with General Ledger Super User responsibility.
2. Navigate to Setup > Financials > Calendars > Types.
The Period Types form opens.
3. Enter standard periods per year.
4. Enter a year type (calendar or fiscal).
5. Enter a description.
6. Click in the Period Type column.
7. Select View > Find.
8. A list of available Period Types is displayed.
9. Save your work.

2.6.2 Setting Up Accounting Calendar

You can define multiple calendars and assign a different calendar to each set of books. For example, you can use a monthly calendar for one set of books and a quarterly calendar for another.

To setup an Accounting Calendar use the following procedure:

Prerequisites

- Carefully consider the type of calendar you need for your organization, it can be difficult to change your calendar (e.g., from a fiscal year to a calendar year) once accounting data has been entered
- Accounting period types are defined

Steps

1. Log in to Oracle Forms with General Ledger Super User responsibility.
2. Navigate to Setup > Financials > Calendars > Accounting.
The Accounting Calendar form opens.
3. Enter a Calendar name.
4. Enter a Description.
5. Add the periods that make up the calendar year.
6. Save your work.

2.6.3 Setting Up Marketing Calendar

The Marketing Calendar defined in this step becomes a value in the LOVs for the profile **AMS: Marketing Calendar**.

To set up the Marketing Calendar use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Profile > System.
3. In the Application field enter Oracle Marketing.
4. In the Profile field enter AMS: Marketing Cal%.
5. At Site Level, click the LOV to view available AMS: Marketing Calendar options.
6. Select the appropriate Accounting Calendar created previously. For more information see [Section 2.6.2, "Setting Up Accounting Calendar"](#).

7. Save your work.

2.6.4 Enabling Currencies

To enable currencies use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with General Ledger Super User responsibility.
2. Navigate to Setup > Currencies > Define.
The Currencies form opens.
3. Place your cursor in the Code Field.
4. Select View > Find.
A list of available currencies and their codes is displayed.
5. The Description, Issuing Territory, Precision and Extended Precision will be completed for you.
6. Add the Symbol.
7. Add the Minimum Accountable Unit.
8. Add the Currency Derivation (Type, Factor, and Effective Date).
9. Add the Effective Dates.
10. Select the Enabled checkbox.
11. Save your work.

2.6.5 Setting Up Currency Conversion Rates

Use the following procedure to set up currency conversion rates.

Prerequisites

None

Steps

1. Log in to Oracle Forms with General Ledger Super User responsibility.
2. Navigate to Setup > Currencies > Rates > Daily.
The Daily Rate Form opens.
3. Select a Rate From currency.
4. Select a Rate To currency.
5. Enter a From date.
6. Enter a To date.
7. Select a Conversion Type.
8. Enter the exchange rate for the currencies and period.
The inverse exchange rate will automatically be calculated.
9. Save your work.

2.6.6 Setting Up Currency Conversion Rate Types

Optionally, use the following procedure to set up currency conversion rate types.

Prerequisites

None

Steps

1. Log in to Oracle Forms with General Ledger Super User responsibility.
2. Navigate to Setup > Currencies > Rates > Types.
3. Enter Rate Type.
4. Enter Description.
For example, Corporate, Corporate Exchange Rate, Spot, or Spot Exchange Rate.
5. Save your work.

2.6.7 Creating a Set of Books

A set of books determines the functional currency, account structure, and accounting calendar for each company or group of companies. If you need to report on your account balances in multiple currencies, you should set up an additional set

of books for each reporting currency. Your primary set of books should reflect your functional currency. Each reporting set of books should use one of your reporting currencies.

To create a set of books use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with General Ledger Super User responsibility.
2. Navigate to Setup > Financials > Books > Define.
The Set of Books form opens.
3. In the Set of Books field enter the full name.
For example, Oracle Vision Operations Australia.
4. In the Short Name field, enter a short name.
For example, Vision, AUS.
5. Enter a Description.
6. Select a Chart of Accounts (select using the LOV).
7. Select the Functional Currency (select using the LOV).
8. Select an appropriate Calendar (select using the LOV).
The Period Type will be filled in automatically.
9. Save your work.

2.7 Setting Up Oracle Human Resources

Oracle Human Resources Management System (HRMS) stores information related to your organization.

HRMS maintains the following information for Oracle Marketing:

- Business Groups
- Locations
- Legal Entities

- Operating unit
- Employee (creation)

See Using Oracle HRMS - The Fundamentals for information on how to perform these tasks.

To implement HRMS for Oracle Marketing use the following procedure:

- [Section 2.7.1, "Determining the HRMS Navigation Path"](#)
- [Section 2.7.2, "Creating Lookup Values for Organization Type"](#)
- [Section 2.7.3, "Creating Locations"](#)
- [Section 2.7.4, "Creating Business Groups"](#)
- [Section 2.7.5, "Creating Organizations"](#)
- [Section 2.7.6, "Assigning Security Profile"](#)
- [Section 2.7.7, "Adding a Legal Entity, Operating Unit and HR Organization"](#)
- [Section 2.7.8, "Creating A Business Unit"](#)
- [Section 2.7.9, "Assigning Multi Org Responsibilities"](#)

2.7.1 Determining the HRMS Navigation Path

The responsibilities and navigation paths for performing HRMS tasks is different depending on the terms of your licence (shared vs. full).

- **Shared HRMS licence:** Create employees using CRM Foundation.
 - Responsibility: CRM Administrator
 - Navigation Path: CRM Foundation > Resource Manager > Maintain Employees > Employees
- **Full HRMS licence:** Create employees using HRMS.
 - Responsibility: HRMS Manager
 - Navigation Path: People > Enter and Maintain

2.7.2 Creating Lookup Values for Organization Type

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

This procedure adds values for a specific lookup “Organization Types (ORG_TYPE)”. If the organization is divided into subsidiaries, create an organization type called Subsidiary.

Prerequisites

None

Steps

1. Log in to Oracle Forms with appropriate HRMS Responsibility.
For more information on appropriate HRMS Responsibility see [Section 2.7.1, "Determining the HRMS Navigation Path"](#).
2. Navigate to Other Definitions > Lookup Tables.
3. Select View > Find.
4. In the Find Form enter ORG% to locate ORG_TYPE.
5. Enter a Code, Meaning, Description, Tag, From and To Dates.
6. Select the Enabled checkbox to make the organization type available. Enter as many organization types as desired.
7. Save your work.

2.7.3 Creating Locations

In Oracle HRMS, you will set up each physical site where your employees work as a separate location. You can set up:

- Global locations: Available in all Business Groups.
- Business Group locations: Available in one Business Group.

Similarly, you enter the addresses of external organizations that you want to maintain in your system, such as employment agencies, tax authorities, and insurance or benefits carriers. When setting up internal or external organizations, you select from a list of these locations.

To create a work structure Location use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Work Structures > Location.

The Location Form opens.

3. Enter a Name.
4. Enter a Date.
5. Enter a Description.
6. Select an Address Style.

Address styles are specific to the country that the address represents. Use the LOV to select a country (this will default an address style automatically).

7. Place your cursor in the Address information field.

The Location Address form opens.

8. Fill in the form for Location Address.
9. Save your work.

2.7.4 Creating Business Groups

The business group is the largest organizational unit representing the enterprise. A Business Group may correspond to a company or corporation, or in large enterprises, a holding or parent company. It can be an organization with a physical location, or it may be an abstract representation of a legal entity that employs people assigned to work in organizations beneath it.

The business group represents the highest level in the organization structure, such as the consolidated enterprise, a major division, or an operation company. The business group secures human resources information. For example, when you request a list of employees, you see all employees assigned to the business group of which your organization is a part.

Multiple sets of books can share the same business group if they share the same business group attributes, including HR flexfield structures.

A default business organization has been set up for you, therefore this step is not required for Oracle Marketing to be fully operational. However, you must set up an organization if you plan to use any financial ERP applications in the future.

For more information see *Multiple Organizations in Oracle Applications*.

2.7.5 Creating Organizations

The first organization to set up is the Business Group, all other organizations will fall below (will belong to) it. Below the Business Group, you represent the groupings in which employees work, such as branches, departments or sections, by means of internal organizations. To enable the assignment of employees to an internal organization, you classify it as an HR Organization.

To create Organizations for work structures use the following procedure:

Prerequisite

None

Steps

1. Log in to Oracle Forms with HRMS Manager Responsibility.
2. Navigate to Work Structures > Organization > Description.
The Find Organization Form opens.
3. Select New.
The Organization Form opens.
4. In the Organization Form enter the following information:
 - Enter a Name for the organization.
 - Select a Type (Organization Type) from the LOV.
 - Select a Location from the LOV.
 - Select whether the organization is Internal or External.
 - Select Organization Classifications from the LOV.
 - Select Enabled (for the Organization Classification selected).
5. Save your work.
6. Click Others.

7. Place cursor in the Organization field, a LOV appears.
8. Enable by selecting the checkbox.
9. Repeat Steps 7 through 12 to enter additional classifications.
10. Save your work.

2.7.6 Assigning Security Profile

In this step, you will be defining the security level for specific Marketing Responsibilities. To do this, use the profile **HR: Security Profile**. This profile enables access (based on responsibility) to a single business group.

To assign the security profile use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Profile > System.
The Find System Profile Values form opens.
3. In the Application field enter Oracle Marketing.
4. In the Responsibility field search and select the responsibility for which the profile is being set.
5. In the Profile field enter HR: Security%
6. In the HR: Security Profile, at Site level, select an organization.
The organization selected is the business group that users will have access to. They will have access only to records within this business group.
7. Save your work.
Validate that the setting for HR: Business Group is the same organization as the HR: Security profile.

2.7.7 Adding a Legal Entity, Operating Unit and HR Organization

To perform the HRMS task of creating a Legal Entity, Operating Unit, Organization follow the procedure below:

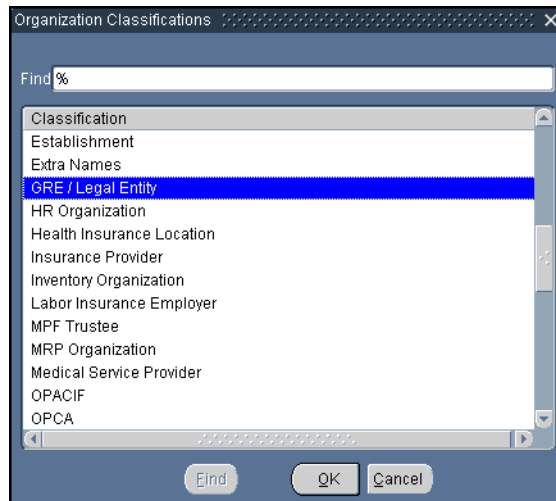
Prerequisite

None

Steps

1. Log in to Oracle Forms with the appropriate HRMS Manager responsibility. For more information on determining this see [Section 2.7.1, "Determining the HRMS Navigation Path"](#).
2. Navigate to Work Structure > Organization > Description.
The Find Organization form opens.
3. Search/and or Select your Organization.
4. Place your cursor in the Organization Classification Name field.
5. Using the LOV select GRE / Legal Entity.

Figure 2–1 GRE Legal Entity



6. Select the Enabled radio button.
7. Save your work and close this form (the Organization form will still be open in the background).
8. Select Others.
9. Select GRE / Legal Entity.

10. Select a Set of Books (defined above).
11. Click OK.
12. Save your work.
13. 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.
 - d. Click Others.
 - e. Select Legal Entity Accounting.
 - f. Select a set of books.
 - g. Click OK.
 - h. Enable by selecting the checkbox.
 - i. Save your work.
14. Add 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.
15. Close the form.

2.7.8 Creating A Business Unit

To create a new Business Unit use the following procedure:

1. Log in to Oracle with the appropriate HRMS Responsibility.

For more information on the appropriate HRMS responsibility see [Section 2.7.1, "Determining the HRMS Navigation Path"](#).
2. Navigate to Work Structure > Organization > Description.
3. Click New.

4. Fill in Name of Business Unit.
5. Select Type (Business Unit).
6. Select a Location.
7. Select an Organization Classification.
8. Select Internal or External.
9. Save your work.

2.7.9 Assigning Multi Org Responsibilities

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

You will assign Multi Org responsibilities to a selected Oracle Marketing responsibility. This displays the appropriate Business Unit when using that responsibility.

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Profile > System.
3. Select a responsibility to be assigned to this 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.

Please refer to *Multiple Organization in Oracle Applications* for additional information.

2.8 Setting Up Oracle Inventory

Oracle Inventory serves as the repository for items that can be used in Oracle Marketing. Use Oracle Inventory to create new products or collateral. After creating new inventory products/items you can add them to a Marketing Campaign or Event. Product/items stored in Oracle Inventory reside in the MTL_SYSTEM_ITEMS table.

Oracle Inventory requires one Inventory Organization to be identified. Typically this is the Master Inventory Organization. In a multiple operating unit environment, the Master Inventory Organization should consist of all the products from all the operating units, it serves as the highest organizational level. If you need to separate products (sold from each operating unit) into different Inventory Organizations, create a separate Inventory Organization for each operating unit. These operating units should exist only as subsets of the Master Inventory Organization.

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

2.9 Setting Up Oracle Receivables

Oracle Marketing uses Oracle Receivables to record customer information. Customer registration information is maintained in the Trading Community Architecture (TCA). TCA stores all customer, partner, prospect, and other customer related information in a single repository. This enables consistent message delivery across all channels.

At a minimum, you need to perform the required Oracle Receivables setups, including tax options and address validation, as described in the Oracle Receivable's User's Guide.

2.10 Setting Up Oracle 1-to-1 Fulfillment

Oracle Marketing uses Oracle 1-to-1 Fulfillment for fulfillment execution. When implementing 1-to-1 Fulfillment the following conditions must be met:

- **Fulfillment Server is created:** A Fulfillment Server is an instance of the request processing software. This is a standalone java server that's responsible for merging dynamic content into the templates to create customized e-mail message for each recipient.

- **Fulfillment Server Group is created:** A Fulfillment Server Group is a group of server instances which process fulfillment requests. Users and roles are assigned to Server Groups for processing of requests. The Marketing user must have the role JFT Fulfillment Admin Role to access Admin > Fulfillment tabs in Oracle Marketing. A Server Group processes the requests of its assigned users and roles before processing other queued requests. Users have been added to the Fulfillment server group. Whenever user submits any request, this server will be used for sending letters.
- **JFT Fulfillment Admin role is assigned to the Implementor:** For more information about assigning this role to the implementor see [Section 3.6.2, "Assigning JTF Fulfillment Admin Role to Users and Groups"](#)
- **AMS: Enable Fulfillment** is set to **Yes**

For more information see [Section 3.6, "Setting Up Fulfillment"](#)

2.11 Creating Users

Prior to implementing Oracle Marketing, you must create the Implementation User. This user contains the appropriate roles and responsibilities necessary to complete implementation tasks. Having a single implementation user makes the process easier as only one user and password will be required to complete all steps.

The Implementation user must be assigned to a group with Sales, TeleSales, and Oracle Marketing Usages. The Implementation User requires these groups in order to access the Audience tab and Administration tab.

To create the implementation user use the following procedure:

- [Section 2.11.1, "Creating the Employee"](#)
- [Section 2.11.2, "Creating the User"](#)
- [Section 2.11.3, "Setting the Default Application and Responsibility"](#)
- [Section 2.11.4, "Importing the Employee"](#)
- [Section 2.11.5, "Granting Access to Audience and Administration Tabs"](#)
- [Section 2.11.6, "Updating Group Access"](#)

2.11.1 Creating the Employee

To create the employee follow the procedure below:

Prerequisites

None

Steps

1. Log into Oracle Forms as HRMS Manager Responsibility.
2. Navigate to People > Enter & Maintain.
3. In the Find Person box, select New.
4. Enter the following information:

- Last Name and First Name
- Title
- Gender
- Type = Employee
- Social Security # (will be checked against existing SS#)
- Birth Date

5. Save your work.

A confirmation will appear in the lower left corner of the window.

6. Select Assignment and enter the following:

- Organization
- Team/Group
- Location
- Supervisor

If a dialog box with Update and Correction buttons displays, select Correction to revise existing data and Update to create a new record.

7. Save your work.

A confirmation will appear in the lower left corner of the window.

8. Select Yes to use the new location.

9. Save your work.

2.11.2 Creating the User

To create the implementation user use the following procedure:

Prerequisites

None

Steps

1. Log into Forms with System Administrator responsibility.
2. Navigate to Security > User > Define.
The Users form opens.
3. In the User Name field, enter a name.

Figure 2–2 Creating the Implementation User

The screenshot shows the 'Users' form with the following details:

- User Name:** AMY_MARKETING_USER
- Description:** (empty)
- Password:** (empty)
- Password Expiration:**
 - ☒ Days
 - ☐ Accesses
 - ☐ None
- Effective Dates:**
 - From: 10-MAR-2003
 - To: (empty)
- Responsibilities:**

Responsibility	Application	Description	Security Group	From	To
Oracle Marketing Super Us	Oracle Marketing	Oracle Marketing	Standard	10-MAR-2003	

4. In the Responsibilities block, assign the following responsibilities to the Implementation User:

- General Ledger Super User
- HRMS Manager
- Inventory
- CRM Administrator
- Oracle Marketing Administrator
- Oracle Marketing Super User
- Workflow User Web Applications
- System Administrator
- Oracle Receivables
- Oracle Payable
- Advanced Pricing
- Receivables Manager

5. Save your work.

2.11.3 Setting the Default Application and Responsibility

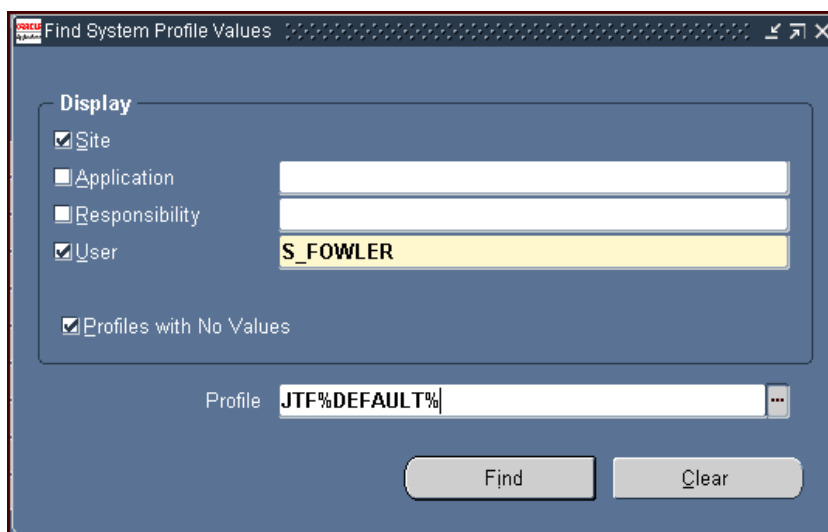
Use the following procedure to assign a default application and default responsibility to the Implementation user:

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
1. Navigate to Security > Profile > System.
2. In the Find System Profile Values Form, at User Level, search for the user that will be assigned to this application and responsibility.
3. In the Profile field enter JFT%DEFAULT%.
4. Select Find.

Figure 2–3 Default Application and Responsibility

5. At user level set the JTF_PROFILE_DEFAULT_APPLICATION to 690.
6. At user level set the JTF_PROFILE_DEFAULT_RESPONSIBILITY TO 21706 (Oracle Marketing Super User).
7. Save your work.

2.11.4 Importing the Employee

Use the following procedure to Import the employee as a Resource.

Prerequisites

Employee exists

Steps

1. Log in to Oracle Forms with CRM Administrator responsibility.
2. Navigate to Resource Manager > Maintain Resources > Import Resources.
3. Locate the employee created in [Section 2.11.1, "Creating the Employee"](#).
4. Enter employee's name in the name fields
5. Select Search.

6. Select Create Resource.
7. Click OK to accept default values.
8. Click Save Resource (record the transaction number).

2.11.5 Granting Access to Audience and Administration Tabs

Using this procedure, you will specify Roles and Groups. This step is required to gain access to the Audience and the Administration tabs.

Prerequisites

None

Steps

1. Navigate to Resource Manager.
2. Select the user as the resource.
3. Click Details.
4. On the Roles tab, select a role type of Sales and a Role of Sales Representative.
5. On the Group tab, select a group with Usages of Sales and TeleSales and Oracle Marketing.
6. Make sure that the Group Member Role Sales Representative is associated to the above group on the resource details screen.
7. Save your work.

2.11.6 Updating Group Access

Run the Concurrent Program **AMS: Group Access Refresh** to finish the process of creating the Implementation user.

2.12 Optional Enhancements

When implementing basic Oracle Marketing, you can optionally implement additional functionality. This functionality can be implemented at the same time as basic Marketing - or it can be implemented later.

The following can be implemented with Oracle Marketing:

- [Section 2.12.1, "Oracle Trade Management"](#)

- [Section 2.12.2, "Oracle eMerchandising"](#)
- [Section 2.12.3, "Oracle Data Mining"](#)

2.12.1 Oracle Trade Management

Designed for the consumer goods sector, Trade Management is a B2B functionality used to:

- Control costs related to promotions
- Track deals made with retailers, distributors or partners
- Process claims and deductions
- Automate and track funds management and promotional spending

For Trade Management implementation details see [Section 6, "Implementing Trade Management"](#)

2.12.2 Oracle eMerchandising

eMerchandising enables a marketer to display personalized web advertisements and product recommendations on a web storefront. eMerchandising is included with an Oracle Marketing license. However, the decision to implement it is optional. Web content is placed on a web page using eMerchandising “web postings”. These are created by establishing rules. Two content types are available for eMerchandising postings:

- Web Advertisements
- Product Recommendations

For eMerchandising implementation details see [Section 4.1, "eMerchandising Overview"](#).

2.12.3 Oracle Data Mining

Data Mining is an analytic feature providing a complete enterprise view of the Oracle Marketing business flows. Using extensive analytical and reporting capabilities all personnel within an organization can monitor the status of marketing activities in real time. Data Mining functionality is included in an Oracle Marketing license. However, the decision to implement it is optional.

For Data Mining implementation details, see [Section 5, "Implementing Data Mining"](#)

2.13 Optional Integrations

Optionally, Oracle Marketing can be integrated with a variety of other applications to enhance its functionality. The following is a list of common integration points for Oracle Marketing:

- [Section 2.13.1, "Integrating Oracle Marketing and Oracle Sales Online"](#)
- [Section 2.13.2, "Integrating Oracle Marketing and Oracle Telesales"](#)
- [Section 2.13.3, "Integrating Oracle Marketing and Oracle Interaction Center \(Scripting\)"](#)
- [Section 2.13.4, "Oracle Content Manager"](#)
- [Section 2.13.5, "Oracle iStore"](#)

2.13.1 Integrating Oracle Marketing and Oracle Sales Online

Oracle Sales Online (OSO) is an application designed for field sales representatives, sales managers, and executives. The application provides a complete set of tools that enables sales teams to manage the sales cycle from beginning to end. OSO supports the key functions of the sales cycle, with features such as:

- Comprehensive customer management
- Lead and opportunity management
- Forecasting
- Quote generation
- Order placement
- Sales methodologies

When integrated with Oracle Marketing, the critical link in the Campaign to Cash business flow is fulfilled, providing the information to analyze the success of company campaigns.

For more information about Oracle Sales Online see *Oracle Sales Online Implementation Guide*.

2.13.2 Integrating Oracle Marketing and Oracle Telesales

Oracle Telesales (OTS) is an application designed for inside sales professionals, inbound telesales agents, or outbound telemarketing agents. OTS offers a multi-channel selling solution that manages leads, opportunities and forecasts

across all sales channels: over the phone, the web or through mobile devices. It provides a set of tools to help the inside sales team manage the sales cycle - from prospecting for customers to booking the order.

When integrating Oracle Marketing and Oracle Telesales, marketers can use the Oracle Marketing List Import feature to assign lists to TeleSales Agents. A TeleSales agent can then use the Universal Work Queue to access the list of customers assigned to them by the marketing team. For implementation details see [Section 3.9.8, "Setting Up Lists for Universal Work Queue"](#).

2.13.3 Integrating Oracle Marketing and Oracle Interaction Center (Scripting)

Oracle Interaction Center is an integrated series of products designed for consistent and effective handling of customer interactions. It provides sophisticated routing, media queuing and enhanced screen pops integration. Interaction center reduces the cost, complexity and risk associated with deploying applications. Interaction Center consists of the following modules:

- Advanced Inbound
- Advanced Outbound
- e-mail Center
- Interaction Center Intelligence
- Scripting
- Universal Work Queue

Oracle Scripting is a set of tools to facilitate the process of gathering of information through guided decision flows, consisting of text, questions, and answers. Oracle Scripting is composed of several components: the Script Author, the Scripting Engine, the Scripting Administration console, and the Survey Administration console.

2.13.4 Oracle Content Manager

Oracle Content Manager (OCM) is the content management system for Oracle Marketing. By providing content management building blocks, Oracle Marketing stores the following content in OCM.

- **Attachments:** Stores all attachments for cover letters. When a user adds attachments to a cover letter, by default they are created in this directory.

- **Marketing Cover Letters:** Stores Fulfillment Cover Letters (also referred to as Templates) used in Oracle Marketing. When a user is creating a cover letter, he or she has an option to pick this directory as the location for his cover letter content item. The appropriate option in this drop-down is: OMO Directory and all its subdirectories excluding Requests subdirectory.
- **Queries:** Stores all the fulfillment Queries defined in Oracle Marketing. When a user creates a custom fulfillment query using the Oracle Marketing Admin screens, by default the content is stored in this directory.
- **Deliverables:** Stores all deliverable e-mail content. When a user creates e-mail content for the marketing deliverable object, by default they are created in this directory.

OCM has a central repository that manages folders, versions, and translations, and enables an organization to work on content with associated workflows. For more information on how Oracle Marketing uses OCM see [Section 3.6, "Setting Up Fulfillment"](#).

2.13.5 Oracle iStore

When Oracle Marketing and Oracle iStore are integrated, you can use the eMerchandising module of Oracle Marketing to personalize web advertisements for Oracle iStore. Using this functionality, a marketer can make recommendations for customers. Store personalization and customer-specific recommendations are accomplished through specialty store web postings from eMerchandising and store Event capture. For detailed information on implementing eMerchandising with Oracle iStore see [Section 4.1, "eMerchandising Overview"](#).

Implementing Oracle Marketing

This chapter includes implementation and administration procedures for Oracle Marketing.

Topics include:

- [Section 3.1, "Oracle Marketing Implementation Process Overview"](#)
- [Section 3.2, "Implementation Task Overview"](#)
- [Section 3.3, "Setting Up Campaigns"](#)
- [Section 3.4, "Setting Up Budgets for Oracle Marketing"](#)
- [Section 3.5, "Setting Up Events"](#)
- [Section 3.6, "Setting Up Fulfillment"](#)
- [Section 3.7, "Setting Up Offers"](#)
- [Section 3.8, "Setting Up Lists"](#)
- [Section 3.9, "Setting Up List Import"](#)
- [Section 3.10, "Setting Up Products"](#)
- [Section 3.11, "Setting Up Price Lists"](#)
- [Section 3.12, "Setting Up Deliverables"](#)
- [Section 3.13, "Setting Up Common Components"](#)
- [Section 3.14, "Setting Up Custom Setups"](#)
- [Section 3.15, "Setting Up Categories"](#)
- [Section 3.16, "Setting Up Marketing Mediums"](#)
- [Section 3.17, "Setting Up Activities"](#)

-
- [Section 3.18, "Setting Up User Statuses"](#)
 - [Section 3.19, "Setting Up Mandatory Rules"](#)
 - [Section 3.20, "Setting Up Locking Rules"](#)
 - [Section 3.21, "Setting Up Approval Rules"](#)
 - [Section 3.22, "Setting Up Geographic Areas"](#)
 - [Section 3.23, "Setting Up Word Replacement Rules"](#)
 - [Section 3.24, "Setting Up Existence Checking"](#)
 - [Section 3.25, "Setting Up Data Sources"](#)
 - [Section 3.26, "Setting Up Marketing Source Codes"](#)
 - [Section 3.27, "Setting Up the Marketing Calendar"](#)
 - [Section 3.28, "Setting Up Click-Through-Destinations"](#)
 - [Section 3.29, "Implementing Oracle Scripting"](#)

3.1 Oracle Marketing Implementation Process Overview

This chapter covers implementation and administrative procedures for an Oracle Marketing Implementation project.

Oracle Marketing ships with defaults and seed data that provides for an implementation with limited customization, configuration, and post-installation procedures. After installing Oracle Marketing, implementation and administrative tasks must be performed to ensure maintainability of the product. This chapter covers those procedures.

Most implementation and administrative tasks include one or more of the following:

- [Section 3.1.1, "Setting Profile Options"](#)
- [Section 3.1.2, "Creating and Verifying Lookups"](#)
- [Section 3.1.3, "Running Concurrent Manager Programs"](#)
- [Section 3.1.4, "Performing Application Specific Tasks"](#)

3.1.1 Setting Profile Options

Oracle Marketing profile options have the prefix AMS, which is the Oracle Marketing product short code. Configuring AMS profile options is one way to change the default behavior of the application. Most profile options ship with a seeded value. Based on your business requirements, you may or may not want to change it. Changing or setting profiles is described in each section where it is required.

Profiles can be set at four levels:

- **Site:** Setting at this level affects the entire E-Business Suite.
- **Application:** Setting profiles at this level overrides the site level setting for the particular application. This level enables the setting to be applied to the specific application you are working with.
- **Responsibility:** Setting profiles at this level affects users of a given responsibility. At this level it overrides the application level setting for users of the particular responsibility.
- **User:** Setting profiles at the user level affect the individual user only. At this level it overrides the responsibility level setting for an individual user.

For a complete list of Oracle Marketing profile options see [Section A.3, "Oracle Marketing System Profiles"](#).

3.1.2 Creating and Verifying Lookups

Lookups provide the list of values (LOVs) that appear in the Oracle Marketing User Interface drop-downs

. Lookups are stored in the FND_LOOKUPS table which is part of the Application Object Library (AOL). Creating and verifying lookups is described in each section where a creation or verification is required.

When implementing Oracle Marketing you will be setting 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 values modified.

For a complete list of Oracle Marketing Lookups see [Section B, "Summary of Lookup Settings"](#).

3.1.3 Running Concurrent Manager Programs

Many operational processes for Oracle Marketing require Concurrent Programs to run. They can run on a scheduled basis or on an as required basis. Setting and running Concurrent Programs is described in each section where a Concurrent Program is required.

Oracle Marketing Concurrent programs are listed in [Section C, "Summary of Request Sets and Concurrent Manager Programs"](#).

3.1.4 Performing Application Specific Tasks

When implementing Oracle Marketing some tasks are required and others are optional. Regardless, you will perform 2 different general types of tasks:

- **Implementation tasks:** One-time tasks performed during or shortly after installation. Examples include: setting profile options, creating and verifying lookup values, and creating users.
- **Administrative tasks:** Repetitive tasks performed post-installation. Examples include: creating fulfillment Templates, configuring Marketing Mediums, and creating Custom Setups.

3.2 Implementation Task Overview

The following table lists the implementation and administrative tasks for Oracle Marketing.

Table 3–1 Implementation Task Overview

Task Name	Task Type	Requirement	Description
Setting Up Campaigns	Implementation/ Administrative	Required	Section 3.3, "Setting Up Campaigns"
Setting Up Budgets	Implementation/ Administrative	Required	Section 3.4, "Setting Up Budgets for Oracle Marketing"
Setting Up Events	Implementation/ Administrative	Required	Section 3.5, "Setting Up Events"
Setting Up Fulfillment	Implementation/ Administrative	Required	Section 3.6, "Setting Up Fulfillment"
Setting Up Offers	Implementation/ Administrative	Optional	Section 3.7, "Setting Up Offers"
Setting Up Lists	Implementation/ Administrative	Optional	Section 3.8, "Setting Up Lists"
Setting Up List Import	Implementation/ Administrative	Optional	Section 3.9, "Setting Up List Import"
Setting Up Products	Implementation/ Administrative	Optional	Section 3.10, "Setting Up Products"
Setting Up Price Lists	Implementation/ Administrative	Optional	Section 3.11, "Setting Up Price Lists"
Setting Up Deliverables	Implementation/ Administrative	Required	Section 3.12, "Setting Up Deliverables"
Setting Up Common Components	Implementation/ Administrative	Required	Section 3.13, "Setting Up Common Components"

Table 3–1 Implementation Task Overview

Task Name	Task Type	Requirement	Description
Creating Custom Setups	Implementation/ Administrative	Required	Section 3.14, "Setting Up Custom Setups"
Setting Up Categories	Implementation/ Administrative	Required	Section 3.15, "Setting Up Categories"
Setting Up Marketing Mediums	Administrative	Optional	Section 3.16, "Setting Up Marketing Mediums"
Setting Up Activities	Administrative	Optional	Section 3.17, "Setting Up Activities"
Setting User Status	Administrative	Optional	Section 3.18, "Setting Up User Statuses"
Creating Mandatory Rules	Administrative	Optional	Section 3.19, "Setting Up Mandatory Rules"
Setting Locking Rules	Administrative	Optional	Section 3.20, "Setting Up Locking Rules"
Creating Approval Rules	Administrative	Required	Section 3.21, "Setting Up Approval Rules"
Setting Up Geographic Areas	Administrative	Optional	Section 3.22, "Setting Up Geographic Areas"
Creating Word Replacement Rules	Administrative	Optional	Section 3.23, "Setting Up Word Replacement Rules"
Setting Up Existence Checking	Administrative	Optional	Section 3.24, "Setting Up Existence Checking"
Creating Data Sources	Implementation/ Administrative	Optional	Section 3.25, "Setting Up Data Sources"
Setting Up Marketing Source Codes	Administrative	Optional	Section 3.26, "Setting Up Marketing Source Codes"
Setting Up the Marketing Calendar	Administrative	Optional	Section 3.27, "Setting Up the Marketing Calendar"
Creating Click-Through-Destinations	Implementation/ Administrative	Optional	Section 3.28, "Setting Up Click-Through-Destinations"
Setting Up Scripting	Implementation/ Administrative	Optional	Section 3.29, "Implementing Oracle Scripting"

3.3 Setting Up Campaigns

Creating and managing Campaigns is a critical functionality performed in Oracle Marketing. Many marketing business objects are associated with a Campaign in

some manner. For more information about how to create or use Campaigns see the *Oracle Marketing User's Guide*.

To implement and administrate Campaigns use the following procedures:

- [Section 3.3.1, "Setting Campaign Profile Options"](#)
- [Section 3.3.2, "Creating and Verifying Lookups for Campaigns"](#)
- [Section 3.3.3, "Running Concurrent Programs for Campaigns"](#)
- [Section 3.3.4, "Setting Up Marketing Mediums for Campaigns"](#)

3.3.1 Setting Campaign Profile Options

Set the following profile to enabled Oracle Marketing to use Oracle 1-to-1 Fulfillment. Set this profile to **Yes** at Site level.

- **AMS : Enable Fulfillment**

To access 1-to-1 Fulfillment for Campaigns, the user needs the JTF Fulfillment Admin role assigned to their user. For more information on assigning this role see [Section 3.6.2, "Assigning JTF Fulfillment Admin Role to Users and Groups"](#).

For more information about setting up fulfillment see [Section 3.6, "Setting Up Fulfillment"](#).

3.3.2 Creating and Verifying Lookups for Campaigns

Use the following table to set or verify Lookups as mandated by your business requirements.

Table 3–2 Campaign System Lookups

Lookup Key	Value	Meaning
AMS_ACCESS_TYPE	Group	Group

Table 3–2 Campaign System Lookups

Lookup Key	Value	Meaning
AMS_CAMPAIGN_ SCHEDULE_STATUS	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
AMS_CAMPAIGN_ STATUS	Active Archived Available Cancelled Closed Completed Denied_BA Denied_TA New On_Hold Planning Submitted_Budget Approval Submitted_Theme Approval	Active Archived Available Cancelled Closed Completed Denied Budget Approval Denied Theme Approval New Active, but locked Planned Submitted for Budget Approval Submitted for Theme Approval
AMS_CAMPAIGN_ PURPOSE	Awareness Lead Lead_ Maturation Sales_ Readiness	Awareness Lead Generation Lead Maturation Sales Readiness

Table 3–2 Campaign System Lookups

Lookup Key	Value	Meaning
AMS_CONTACT_POINT_TYPE	Address	Address
	Email	Email
	Fax	Fax
	Inbound_script	Inbound Script
	Outbound_script	Outbound Script
	Phone	Phone
	Website	Website
AMS_CONTACT_POINT_TYPE	Address	Address
	Email	Email
	Fax	Fax
	Inbound_script	Inbound Script
	Outbound_script	Outbound Script
	Phone	Phone
	Website	Website
AMS_MASTER_OBJECT_TYPE	Camp	Campaign
	CSCH	Campaign Schedule
	EONE	One-Off Event
	EVEH	Event
AMS_MEDIA_TYPE	Broadcast	Advertising
	Deal	Deal
	Direct_Marketing	Direct Marketing
	Events	Events
	Internet	Web Marketing
	In_Store	In Store
	Public_Relations	Press and Analyst Relations
AMS_PRIORITY	Trade_Promotion	Trade Promotions
	Fast_Track	Fast Track
	High	High
	Standard	Standard

Table 3–2 Campaign System Lookups

Lookup Key	Value	Meaning
AMS_PROGRAM_OBJECTIVE	User Defined	
AMS_PROGRAM_STATUS	Active Archived Cancelled Completed New On_Hold	Active Archived Cancelled Completed New Active, but locked
AMS_ROLLUP_TYPE	Coll Deal ECAM EVCAM Partner RCAM TRDP	Collection Deal Campaign Event Promotions Partner Program Trade Promotion
AMS_SCHEDULE_OBJECTIVE	User Defined	User Defined
AMS_TRIGGER_CHK_METRIC_TYPE	Actual Forecast	Actual Value Forecast Value
AMS_TRIGGER_CHK_TYPE	DIWB Metric Static_Value	Workbook Metric Static Value
AMS_TRIGGER_FREQUENCY_TYPE	Daily Hourly Monthly None Quarterly Weekly Yearly	The frequency of trigger checking

Table 3–2 Campaign System Lookups

Lookup Key	Value	Meaning
AMS_TRIGGER_TYPE	Metric_Metric	Metric to Metric type trigger
	Metric_Value	Metric to Value type trigger
	Metric_Workbook	Metric to Workbook type trigger
AMS_CAMP_RELATED_EVENT	EONE	One-Off Event
	EVEH	Event
	EVEO	Event Schedule

3.3.3 Running Concurrent Programs for Campaigns

To implement Campaigns, run the following Concurrent Programs.

Table 3–3 Campaign Concurrent Programs

Concurrent Program	Required	Description
AMS Activate Schedule	Optional	This program picks up all Campaign Schedules that are in Available status and makes the Schedule active. This program will be successful if the Campaign Schedule start date has passed and if the Campaign is active.
Workflow Background Process	Optional	In order to implement triggers, Workflow Background Process must be run for the item type OMO Triggers. The 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 e-mail through triggers.

3.3.4 Setting Up Marketing Mediums for Campaigns

A Marketing Mediums is a specific channel used to execute a Campaign. Marketing mediums differ by activity. Certain execution channels, such as Oracle Advanced Outbound, require particular Marketing Mediums to be selected for a Campaign Schedule.

Logical flow for creating Marketing Mediums:

1. Determine Business requirements for Marketing Mediums.
2. Create Marketing Medium. This task is performed by the Oracle Marketing Administrator.
3. Create a Campaign. This task is performed by a marketer or user.
4. Create Campaign Schedule. This task is performed by a marketer or user.
5. Include Marketing Medium as part of the Campaign Schedule. This task is performed by a marketer or user.

For example, assume that a Campaign “Valentine’s Day Direct Mail” has been created. To accompany this Campaign, a Campaign Schedule with the following attributes exists:

- Activity type - Direct Marketing
- Activity - Direct Mail
- Marketing Medium - Direct Mail House

In this example, the Marketing Medium (Direct Mail house) is used as the execution channel for the Campaign (Valentine’s Direct Mail).

For more information about performing the user tasks see the *Oracle Marketing User’s Guide*.

As the Administrator, use the following procedure to create Marketing Mediums:

Prerequisites

- Marketing Campaign is created
- Campaign Schedule is created

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Marketing Medium.
3. Select Create.
4. Fill out the following required fields as they relate to Marketing Mediums.
 - **Marketing Medium Name:** This should reflect the Campaign Schedule, activity type, and activity it will be associated with.

- **Country:** Choose the appropriate country for the Marketing Medium.
- **Activity:** Choose the appropriate activity for which this medium will support. For example, if the Marketing Medium is Direct Mail House, choose Direct Mail for the activity.

5. Select Create.

Confirmation text appear on the page indicating that changes are saved. After the Marketing Medium has been created by the Administrator, the Marketer can then use the Marketing Medium as part of the Campaign Schedule.

3.4 Setting Up Budgets for Oracle Marketing

Budgets are used in Oracle Marketing to supply funds for Campaigns, Events and other marketing objects. Approval rules determine the Budget approval process and direct the approval workflow. Budget funds are released for marketing objects only after approvals are received.

Budgets are not striped (divided) by organization. However, they are stored with the organization ID according to the responsibility of the user who created the Budget.

To implement Budgets for basic Marketing use the following procedures:

- [Section 3.4.1, "Selecting a Default Set of Books"](#)
- [Section 3.4.2, "Setting System Profiles for Budgets"](#)
- [Section 3.4.3, "Creating and Verifying Lookups for Budgets"](#)
- [Section 3.4.4, "Running Concurrent Programs for Budgets"](#)
- [Section 3.4.5, "Setting Up Budget Security"](#)
- [Section 3.4.6, "Setting Up Budget Categories"](#)
- [Section 3.4.7, "Understanding Budget Status"](#)
- [Section 3.4.8, "Setting Up Budget Approval Rules"](#)
- [Section 3.4.9, "Setting Up Business Units for Budgets"](#)
- [Section 3.4.10, "Setting Up Multiple Currencies for Budgets"](#)
- [Section 3.4.11, "Setting Up Budget Requests"](#)
- [Section 3.4.12, "Setting Up Budget Reconciliations"](#)
- [Section 3.4.13, "Setting Up Budget Roll-up Views"](#)

3.4.1 Selecting a Default Set of Books

The default set of books is the financial reporting entity that uses a particular chart of accounts, functional currency, and accounting calendar. Oracle General Ledger (GL) secures transaction information (such as journal entries and balances) by a set of books. When using GL, you will choose a responsibility that specifies a set of books. You then see information for that set of books only.

When a user creates a Budget for marketing purposes, it can be defined in any currency. However, in the background, the functional currency is always recorded. The functional currency is the default currency used by the main set of books.

To establish a default set of books for the Oracle Marketing application use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Claim > System Parameters.
3. Select the Set of Books to be used.

The LOV for selecting the default Set of Books is visible only upon first login (per responsibility). After the Set of Books is selected, it becomes a read-only field (see below). At this point, it should not be changed. To make changes to the Set of Books, after the first login, use Oracle General Ledger.

Figure 3–1 Oracle Marketing Set of Books

The screenshot displays the 'Set of Books' configuration interface. At the top, there are 'Update' and 'Restore' buttons. Below them, the 'Set Of Books' is set to 'Vision Operations (USA)'. The 'Accounting Method' is a dropdown menu currently showing 'Accrual'. A section titled 'Claim' contains three fields: 'Reason' with the value 'Shortages', 'Days Due' with the value '30', and 'Default Owner' with the value 'Sundarrajan, Mr. Durai'. Each of these three fields has a small blue key icon to its right, indicating they are read-only. At the bottom, there is a checkbox labeled 'Assignment Manager Implemented' which is currently unchecked.

4. Select Update.
5. Save your work.

3.4.2 Setting System Profiles for Budgets

The following table lists profiles for basic Budgets. If implementing Trade Management, additional profiles need to be set.

Table 3–4 Budget Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS : Default Budget for a Person	Yes	Site Appl Resp User	Choose a Budget name from the list of available Budgets	During Budget request for objects users may decide to source from a Budget or from a Person. When from a person, the system will automatically default the Budget name specified by the profile on to the Budget request. Users will be able to change it on screen.
AMS : Source from Parent Object	Yes	Site	Yes/No	This applies to the following objects: ■ Offers ■ Campaign Schedule ■ Event Schedule If set to Yes, objects can only source from their parent objects. For Offers and Campaign Schedules, the parent is a Campaign. For an Event Schedule, the parent can be an Event or a Campaign. During Budget request, the “sourcing” section of the page will default to the information of the parent object. In this case, the parent object first needs to secure its own Budget source. After Budget requests are approved, money can then be distributed to their child objects. In this case, the Campaign or Event becomes a mini-Budget. If set to No, source funds are pulled directly from a Budget.

Table 3–4 Budget Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS : Universal Currency	Yes	Site	Choose any valid currency from a list of available currencies	This profile determines the currency of the Rollup View. It allows the Rollup View of a Budget to display correctly by converting all entries to a single currency. Different users are able to see different currencies based on the user profile JTF_PROFILE_DEFAULT_CURRENCY. In other words, the universal currency profile is simply for storage in the background. Once the profile is set it should not be changed.
AMS: Budget has Grace Period	No	Site Appl Resp User	Yes/No	Yes indicates Budgets have grace periods.
AMS : Budget Adjustment Grace Period in Days	No	Site Appl Resp User	Enter any integer (for number of days)	For marketing purpose, Reconciliation is a way to return previously committed, un-utilized funds from marketing objects (Campaigns, Events, etc.) back to Budgets. They are transferred from the Committed column to the Available column. Depending on the business, Budget reconciliation can be performed manually or automatically. If performed automatically, the AMS-TM: Release Committed Budget Amount After Grace Period concurrent program must be ran.
AMS : Default Partner Budget	No	Site Appl Resp User	Choose a Budget name from the list of available Budgets	Default Budget for a partner.

Table 3–4 Budget Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS: Cut Off Percentage for Approval	No	Site	Enter any number (for percentage)	This profile determines what percentage of the estimated Budget amount an object must secure in actual funding before the object can go active. For example, if you enter 100, then 100% of an Offer's estimated Budget amount must get approved before the Offer can go active.

3.4.3 Creating and Verifying Lookups for Budgets

Set or verify the following Lookups as mandated by your implementation business requirements:

Table 3–5 Budget Lookups

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	Fixed
AMS_UTILIZATION_TYPE	System	Utilized	Utilized
AMS_TRANSFER_TYPE	Extensible	Release Reserve Transfer Request Utilized	Release Reserve Transfer Request Utilized

Table 3–5 Budget Lookups

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_BUDGET_SOURCE_STATUS	System	Approved Closed New Pending Rejected	Approved Closed Planning Pending Rejected These Lookups provide different statuses of a Budget request. Pending Validation used for Budget-Offer validation purpose to inform users on screen that the validation is still occurring.
AMS_PRODUCT_LEVEL	System	Product Family	Product Product Family

Table 3–5 Budget Lookups

Key	Type	Values	Meanings
AMS_VALUE_LIMIT	Extensible	Balance Committed Paid Planned Utilized	Balance Committed Paid Planned Utilized
AMS_TRANSFER_REASON	User	Sourcing	Initial Sourcing (This determines the list of values available on any Budget Request screen.)
AMS_UTILIZATION_TYPE	System	Budget Request Budget Transfer Utilized	Budget Request: Used to identify Budget request. Budget Transfer: Used to identify Budget transfer. Utilized: Used to identify utilization; different from accrual in that this identifies either off invoice type of discount Offers or Campaign/Offer's cost postings to Budget These lookups are the different "Type" values for the Budget Committed and Utilized columns. Changing these meanings will change the display of these values in the Budget checkbooks and cells.

3.4.4 Running Concurrent Programs for Budgets

Run the following Concurrent Programs for Budgets:

Table 3–6 Concurrent Programs for Budgets

Concurrent Manager	Required	Description
AMS : Workflow background process	Yes	Used for AMS Marketing approval.

Table 3–6 Concurrent Programs for Budgets

Concurrent Manager	Required	Description
AMS-TM: Release Committed Budget Amount After Grace Period	Yes	Reconciliation is a way to return previously committed, but un-utilized funds. It transfers the un-utilized funds from the Committed column to the Available column (“Reconcile Un-Utilized”) for a marketing object. Depending on the business, Budget reconciliation may be performed manually on each object, or automatically via this concurrent process. When the latter is used, the program considers the "AMS: Budget Adjustment Grace Period in Days" profile option to determine how long to wait before reconciling the sourced Budgets of an object after the closing date of the object. For example, if an Offer closes on Jan. 1 and the profile is set to 30. When running the concurrent program on Jan. 10, this Offer’s Budgets will not be reconciled. If the concurrent program runs on Jan. 31 or after, they will be reconciled. Parameters: p_object_type (Object Type, for example, CAMP, OFFR, EVEH)
AMS - Team Access Refresh Program	No	This program is used for all objects with Teams (Budget uses Teams). When any change to the team is made, this program needs to be run to accurately reflect who the team members are.

3.4.5 Setting Up Budget Security

When a user creates a Budget it is created with:

- Responsibility ID of Budget creator
- Organization ID (operating unit ID) of Budget creator

The Oracle Marketing Super User responsibility does not automatically have access to Budgets.

For example, John is the owner of Budget A, he does not have the “Oracle Marketing Super User” responsibility. User Mary has “Oracle Marketing Super User” responsibility and is a team member with edit metrics capabilities for Budget A. The field “category” on the Budget is locked by locking rules. John cannot update this field even though he is the owner, while Mary can.

The table below explains the access security levels for Budgets.

Table 3–7 Budget Security Levels

Security Level	User Name	Access Control
1	AMS: Admin Group	Updates all fields: ■ Excluding those locked by system ■ Including those locked by locking rules
2	Owner	Updates all fields: ■ Including Owner field ■ Including adding Team members ■ Excluding those locked by system ■ Excluding those locked by locking rules
3	Team members with Edit Metrics	Updates all fields: ■ Excluding Owner field ■ Including adding Team members ■ Excluding those locked by system ■ Excluding those locked by locking rules
4	Team members without Edit Metrics	View Budget only
5	Everyone else	No access, no view

3.4.6 Setting Up Budget Categories

Budget Categories serve two purposes:

- **Budget Classification:** Configurable ways to classify a Budget. When classifications are used, Budgets can be divided into sales, marketing, or partnering purposes. For example, if a Budget classification for Partners exists, a category, “Partner Marketing Funds” can be created.

- **Approval Rule Setups:** These rules determine who gets to approve Budgets and under what conditions they can approve them. Approval rules can be either root Budget approval rules or Budget approval rules.

To create Categories for Budgets follow the procedure below:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Category.
3. Select Create.
4. Select Created For = Budget.
Wait for the page to refresh.
5. Enter a Category Name.
6. Select a Parent Category if desired.
7. Select the Enabled checkbox to make the Category available.
8. Optionally enter a description.
9. Provide the following information:
 - Enter an appropriate prefix. These are used as a prefix for the Budget numbers that are generated automatically.
 - Enter valid activities. This is optional. Activities defined here will be used to evaluate Budget eligibility of Campaign schedules.
10. Select Create.

3.4.7 Understanding Budget Status

A Budget goes through the following main system statuses:

- **Draft:** Budget amounts are entered but not approved.
- **Pending approval:** Budget is being reviewed and needs approval before it becomes active.
- **Active:** The Budget is active and can be used to fund activities.

Approval rules are used to determine the route from Draft to Active. Approval rules are highly configurable and multiple can be created based on the Budget's characteristics.

Table 3–8 Budget Statuses

Status	Description
Draft	Budgets in draft status can be updated at any time in any way. Draft status may be updated to Pending Approval or Cancelled. It can also be updated to Active directly in case the Budget owner is also the owner of the parent Budget, and the parent Budget is already Active.
Pending Approval	The Budget has been submitted for and is awaiting approval. After all approvers have responded positively, a Budget may become Active or On Hold. If approvers reject the Budget it will become Rejected.
On Hold	On Hold is an interim status that is used when Budget has already obtained approval, and is just not completely ready to be made active. At On Hold status, a user can then manually change it to Active or Closed.
Rejected	Budget approvers have rejected the Budget. From Rejected, the status can be manually changed back to Draft.
Active	A Budget that has been approved and is ready to fund various activities and promotions. From Active, the status can be changed to Closed and Cancelled.
Cancelled	Indicates the Budget has been aborted. From Cancelled, the status can only be changed to Archived.
Archived	The Budget can no longer be used. This cannot be changed to any other status.
Closed	From On Hold or Active, Budget status can be manually changed to Closed. It indicates that the Budget has ended and is no longer available to fund activities and Offers.

A Budget status changes once it has been updated. Approval rules determine who can change Budget status and under what conditions.

3.4.8 Setting Up Budget Approval Rules

Approval rules determine which users can approve Budgets and under what circumstances their approvals are applied. Approval rules for Budgets can be configured using multiple parameters. For example, Budget approvals can be based on amount or approval organization.

Approval rules are evaluated based on the following hierarchy:

- Business Unit = 6
- Organization = 5
- Approval Object Type = 4
- Budget Category = 3
- Custom Setup = 1

The higher the number, the more important the parameter when determining which approval rule applies to which particular Budget.

Approval rules are contained in the package `ams_approval_pvt` and the file containing the code is `amsvappb.pls`.

To set up approval rules use the following procedure:

Prerequisite

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Approval Rule.
The Approval Rule page opens.
3. Select Create.
The Create Approval page opens.
4. Enter the following information:
 - **Approval Rule Name:** Give a name for your approval rule
 - **Start Date:** Starting date from which the approval rule will be in use
 - **Approval Rule For:** Name of person to whom the rule applies.

- **Root Budget Request:** Select this if defining the rule for who gets to approve a Budget and under what circumstances.
 - **Budget Request:** Select this if defining the rule for who gets to approve a marketing objects' request for funding and under what circumstances.
 - **Organization:** Displays a list of operating units. Select the operating unit for which this approval rule will apply.
 - **Budget Category:** Select the Budget category that will fall into this approval rule.
 - **Setup Type:** Custom setups created for Budgets purpose.
 - **Minimum Amount and Maximum Amount:** Define the range of Budget amounts or Budget request amounts that will fall into this approval rule.
 - **Description:** Optionally describe your approval rule.
5. Select Create.
The Approval Rules details page opens. It displays an Approvers table. This table enables you to define the people who will be approving the Budget:
 6. In the Approvers section enter the following information:
 - **Order:** Enter any integer in ascending order.
 - **Type:** This can be Function (for customization purpose), Role (defined for marketing and assigned to Resources), or User (a user type).
 - **User/Role:** Depending on the Type selected above, this may display a list of functions, roles or users
 - **Start Date:** The date starting from which the approver is active. Within the range of the approval rule, each line can also have a start date and end date.
 - **End Date:** The date when the approver stops being the approver.
 7. Select Update to save your work.

3.4.9 Setting Up Business Units for Budgets

When creating a Budget, the list of values for the Business Unit field comes from Organizations defined in Oracle HRMS. When defining any internal organization in HRMS, you have the ability to classify the organization using "Type". One of the type options is "Business Unit". This Type serves mostly for classification purposes.

Prerequisite

None

Steps

1. Log in to Oracle Forms with Human Resources responsibility.
2. Navigate to Work Structures > Organization > Define.
3. Click New.

This enables you to define a new organization or query for a particular organization.

4. In the Define a new organization form, select Type = Business Unit.
5. Save your work.

This organization will now appear in the list of values for Business Unit in Oracle Marketing Budgets.

3.4.10 Setting Up Multiple Currencies for Budgets

Companies can create Budgets, as well as other marketing objects in multiple currencies. Marketing automatically does currency conversion based on the conversion rates defined in the profile **AMS: Default Currency**.

Users can transfer Budgets and request money from Budgets in any currency. It is not required that the Budgets sourcing these requests is in the same currency. When a request for money is made in one currency, the user will see the approval notification and money transfer in that 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.

Although the system has a default currency, a user can specify a different default currency. To change the currency default use the following procedure:

Prerequisites

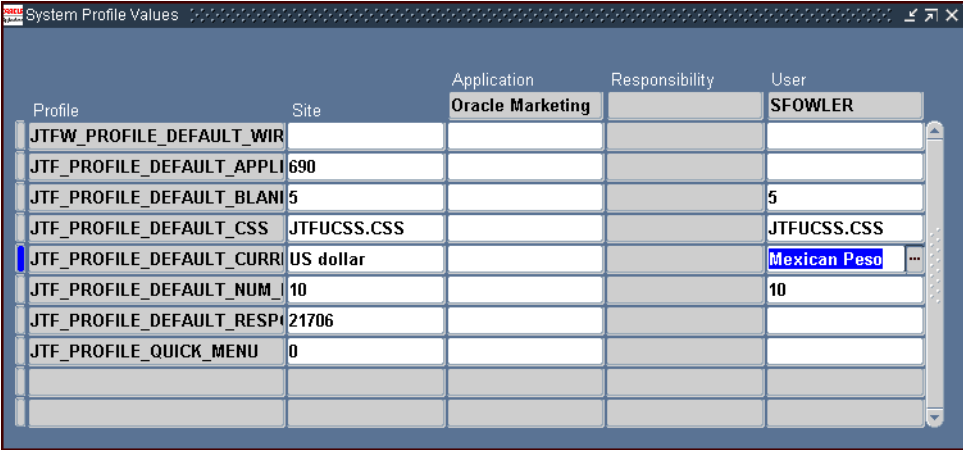
The user exists in the system

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Profile > System.

3. In the Application block type Oracle Marketing.
4. In the User block type the name of the user for which the default currency is being selected.
5. In the Profile block type %JTF%PROFILE%.
6. Select Find.
7. In the User column, change the default currency.
8. Save your work.

Figure 3–2 Changing Default Currency



Profile	Site	Application	Responsibility	User
JTFW_PROFILE_DEFAULT_WIR		Oracle Marketing		SFOWLER
JTF_PROFILE_DEFAULT_APPLI	690			
JTF_PROFILE_DEFAULT_BLANI	5			5
JTF_PROFILE_DEFAULT_CSS	JTFUCSS.CSS			JTFUCSS.CSS
JTF_PROFILE_DEFAULT_CURR	US dollar			Mexican Peso
JTF_PROFILE_DEFAULT_NUM	10			10
JTF_PROFILE_DEFAULT_RESP	21706			
JTF_PROFILE_QUICK_MENU	0			

9. Log in to Oracle Marketing using the user name previously created.
10. Click the Profile icon.
11. Navigate to Personalization > Display Preferences.
12. Verify that the currency preference is correct.

Figure 3–3 Currency Display Preferences

General Display

Language

American English

User Currency

Mexican Peso

Date Format

DD-MON-RRRR

Time zone is not enabled at this site.

Display Style

CRM 11i Style Sheet

3.4.11 Setting Up Budget Requests

To access Budget Request screen, the proper security access level for the users must be enabled. For more information see [Section 3.4.5, "Setting Up Budget Security"](#)

Additionally, you may need to define multiple Transfer Reasons to record the reasons for each request. To do so, extend the Lookup "AMS_TRANSFER_REASON".

3.4.12 Setting Up Budget Reconciliations

Budget Reconciliation enables a marketer to return the previously committed, but un-utilized funds, by transferring them from the Committed column to the Available column ("Reconcile Un-Utilized") for marketing objects, such as Campaigns. This functionality should not be performed by all users. As such, this function needs security control.

Budget Reconciliation Security is based on:

- Custom Setups: Enables or disables the Reconcile button to exists on the Budget cue card. For more information about custom setups see [Section 3.14, "Setting Up Custom Setups"](#).
- Responsibility: User responsibility levels enables or disables access to the Budget cue card (regardless of Custom Setup). This can be controlled by including or excluding a function during responsibility setup.
- Including or excluding the Responsibility for Reconcile: Whether a user's responsibility allows him to access the Reconcile button inside the Budget cue card (regardless of the above function) can be controlled by including or excluding another function just for the Reconcile portion. This is controlled during responsibility setup.

- Offer Start and End Date: The Reconcile button will only appear if the Offer's end date has been reached and status is completed, or if Offer has no end date its status should be completed.

To enable Automated Reconciliation, run the concurrent program **AMS-TM: Release Committed Budget Amount After Grace Period**.

3.4.13 Setting Up Budget Roll-up Views

Budget roll-up view is a way for each Budget to display the amount for itself and also the amount summed up from its children. The roll-up summed view is its own Budget amount + all descendent Budget amounts.

This features gives an organization a high level view of all Budget balances summed up to each level. Activities and usages can be viewed by drilling down into different numbers such as committed and utilized portions of the Budget. When drilled down from a Rollup View, the details will show for the Budget itself and all of its child Budgets.

For example, a Budget called "California" has committed amounts of \$10K. A Budget called "Oregon" has \$20K. Their parent Budget "Western US" funds no other activities, its Rollup View committed therefore = \$30K.

To enable the Budget roll-up view, set the profile option AMS: Universal Currency profile option at site level. This stores the one currency which is used to convert to all other currencies. In addition, for each user, set the **JTF_PROFILE_DEFAULT_CURRENCY** the view of the roll-up is specified by the user's preferred currency.

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator Responsibility.
2. Set the profile **AMS: Universal Currency** at the site level.
3. For each user, set the **JTF_PROFILE_DEFAULT_CURRENCY** at user level.
This determines what currency a user will see in the Budget Rollup View.
4. Log in to Oracle Marketing.
5. Navigate to the Budget tab.
6. Select Rollup View.

- Self View will show all amounts for the Budget, whereas Rollup View will show all amounts summed for the Budget itself and all Budgets underneath it.
- The Rollup View converts all Budgets to the profile currency as set up above. Because the profile is set at user level, different users will see the Rollup View accordingly.

3.5 Setting Up Events

The Events functionality of Oracle Marketing enables Event planning and execution. Event Schedules can be defined for various locations and times. To support rapid Event creation, definition, and maintenance Events can be setup to define content, messaging, and planning information.

Events can act as templates for Event Schedules. An Event can be independent or part of a marketing Campaign. Events are associated with Campaigns, Lists, Budgets, Deliverables, and Messages.

Use the following procedure to implement Events:

- [Section 3.5.1, "Setting System Profile Options for Events"](#)
- [Section 3.5.2, "Creating and Verifying Lookups for Events"](#)
- [Section 3.5.3, "Running Concurrent Programs for Events"](#)

3.5.1 Setting System Profile Options for Events

Set the following profile options for Events:

Table 3–9 Profile Options for Events

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

Table 3–9 Profile Options for Events

Option	Required	Level	Setting	Effect/Limitation
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.
OS O : Customer Access Privilege	Required	Resp	Full	Set this profile to Full in order to grant access to the Venue subtab.
OSO : Bypass Group Validation	Required	Resp	Yes/No	Set this profile to Yes to grant access to the Venue subtab.
AMS : Enable Fulfillment	Optional	Site	Yes/No	Enables Oracle Marketing to be integrated with Oracle 1-to-1 Fulfillment.
AMS : Should Call to Inventory Modules be Made	Yes	Site	Yes/No	Indicates whether an Event may be created as an Oracle Inventory item. Set to Yes if wanting to store Events in inventory as “items”.
AMS : Should Call to Pricing Modules be Made	Yes	Site	Yes/No	Indicates whether an Event may be priced.

3.5.2 Creating and Verifying Lookups for Events

Create or verify the following system lookups for Events.

Table 3–10 Event Lookups

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

Table 3–10 Event Lookups

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

Table 3–10 Event Lookups

Key	Type	Values	Meanings
AMS_EVENT_SPEAKER_STATUS	System	Booked Cancelled Confirmed Scheduled	Booked Cancelled Confirmed Scheduled
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

Table 3–10 Event Lookups

Key	Type	Values	Meanings
AMS_EVENT_PAYMENT_STATUS	System	Comp Free Invoiced Paid Refunded	Complimentary Free Invoiced Paid Refunded
AMS_EVENT_LEVEL	System	Main Sub	Main Sub
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

Table 3–10 Event Lookups

Key	Type	Values	Meanings
AMS_EVEH_PURPOSE	User	Organization defined values	Purpose for the Event.
AMS_EVEO_OBJECTIVE	User	Organization defined values	Objective for the Event.
AMS_RATE_CODE	User	User defined entries	Rates for venues.
AMS_VENUE_RATING	User	Excellent Good Fair Poor	Excellent Good Fair Poor
AMS_VENUE_TYPE	User	Convention_Center Hotel Kiosk/Booth	Convention Center Hotel Kiosk/Booth
AMS_EVENT_CONTENT_ACTIVITY	User	Cancelled Date_Change Reg_Cancel Reg_Confirm Reg_Waitlist Venue_Change	Event Cancellation Event Date/Time Change Registration Cancellation Registration Confirmation Wait List Confirmation Venue Change

3.5.3 Running Concurrent Programs for Events

For Events, run the program **Activate Event Schedules**. This will pick up all Event Schedules containing the status of **Available**. It will also pick up Event Schedules for which the start date has passed (given that the Event and Schedule are active).

3.6 Setting Up Fulfillment

Oracle Marketing uses 1-to-1 Fulfillment to fulfill actions necessary for Events, Campaigns, and related marketing objects. For example, if creating a template (cover letter) for online Event registration confirmation, 1-to-1 Fulfillment handles e-mail delivery.

To enable Fulfillment follow the procedures below:

- [Section 3.6.1, "Setting Up Fulfillment Directories"](#)
- [Section 3.6.2, "Assigning JTF Fulfillment Admin Role to Users and Groups"](#)
- [Section 3.6.3, "Setting Fulfillment Profiles"](#)
- [Section 3.6.4, "Setting Up Fulfillment Templates"](#)
- [Section 3.6.5, "Setting Up Fulfillment Queries"](#)
- [Section 3.6.6, "Setting Up Fulfillment Rules"](#)

3.6.1 Setting Up Fulfillment Directories

Oracle Content Manager (OCM) is the content repository for Oracle Marketing. As the content manager, it handles directory privileges and access control for content directories.

Therefore, if an Oracle Marketing User or Administrator is creating, editing, or approving fulfillment content, the “Fulfillment Queries” privilege must be assigned to that Marketing User or Administrator. This task is performed in the OCM Folder UI.

Similarly, in order to create, edit, or approve templates, attachments, or collateral stored in OCM, the required privileges need to be granted to that user for the directory “Oracle Marketing Root”.

Although granting folder access is required, using OCM UI’s to create, update, or preview Oracle Marketing content is not recommended.

To setup Fulfillment Privileges use the following procedure:

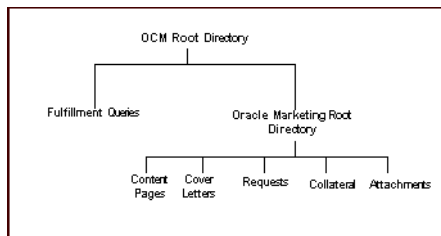
- [Section 3.6.1.1, "Understanding the Oracle Marketing Root Directory"](#)
- [Section 3.6.1.2, "Granting Directory Privileges to Users and Groups"](#)

3.6.1.1 Understanding the Oracle Marketing Root Directory

If a user is given access to the Oracle Marketing Root directory, the same privileges are granted for all subsequent child directories. For example, if a user is given access to Oracle Marketing Root directory, that user will also have access to the collateral directory (a child of the Oracle Marketing Root directory).

The OCM has the following directory structure:

Figure 3–4 OCM Directory Structure



The OCM Root Directory is the parent of all subsequent directories. The Oracle Marketing Root Directory contains various content items for Oracle Marketing.

3.6.1.2 Granting Directory Privileges to Users and Groups

A user creating templates and queries, must have privileges to the fulfillment queries directory. For specific procedures see *Oracle Content Manager Implementation Guide*.

3.6.2 Assigning JTF Fulfillment Admin Role to Users and Groups

To access Status and History cue cards (under Admin-> Fulfillment), the user needs to have the JTF Fulfillment Admin role assigned to him. Additionally, if setting up 1-to-1 Fulfillment for Events and Campaigns the user must have this role.

To assign this role to a user follow this procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with CRM Administrator responsibility.
2. Navigate to Resource Manager >Maintain Resources >Import Resources.
3. Select the employee as the resource.
4. Select Details.
5. In 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. For 1-to-1 Fulfillment:

- a. Add JTF_FM_ADMIN role.
 - b. Assign the Fulfillment Resource Group.
 - c. If the user is the default approver for marketing objects, add a Role of Default Marketing Approver.
 - d. If the user is an approver for marketing objects, a Role of Marketing Approver. Multiple assignments of this Role are permissible.
6. Save your work.

3.6.3 Setting Fulfillment Profiles

To enable 1-to-1 Fulfillment set **AMS: Enable Fulfillment** to **Yes** at site level.

3.6.4 Setting Up Fulfillment Templates

Fulfillment templates (also referred to as cover letters) are dynamic documents that contain queries. In short, they are saved structured e-mails containing a mixture of text and graphics. Templates are used for e-mail fulfillment. A template consists of associated query tags merged into the template body. Query tags fetch dynamic data during request processing to create customized e-mail content.

A template is associated with a particular fulfillment action. After creating the template, you must manually change its status to **Active** before associating it with an action.

To create Fulfillment Templates (cover letters) use the following procedures:

- [Section 3.6.4.1, "Creating Fulfillment Templates"](#)
- [Section 3.6.4.2, "Adding Images to a Template"](#)

3.6.4.1 Creating Fulfillment Templates

When creating content for queries and templates the data is stored in the Oracle Content Management (OCM) schema. To view these content folders and directories, you must have the correct role assigned to your user. For more information see [Section 3.6.2, "Assigning JTF Fulfillment Admin Role to Users and Groups"](#).

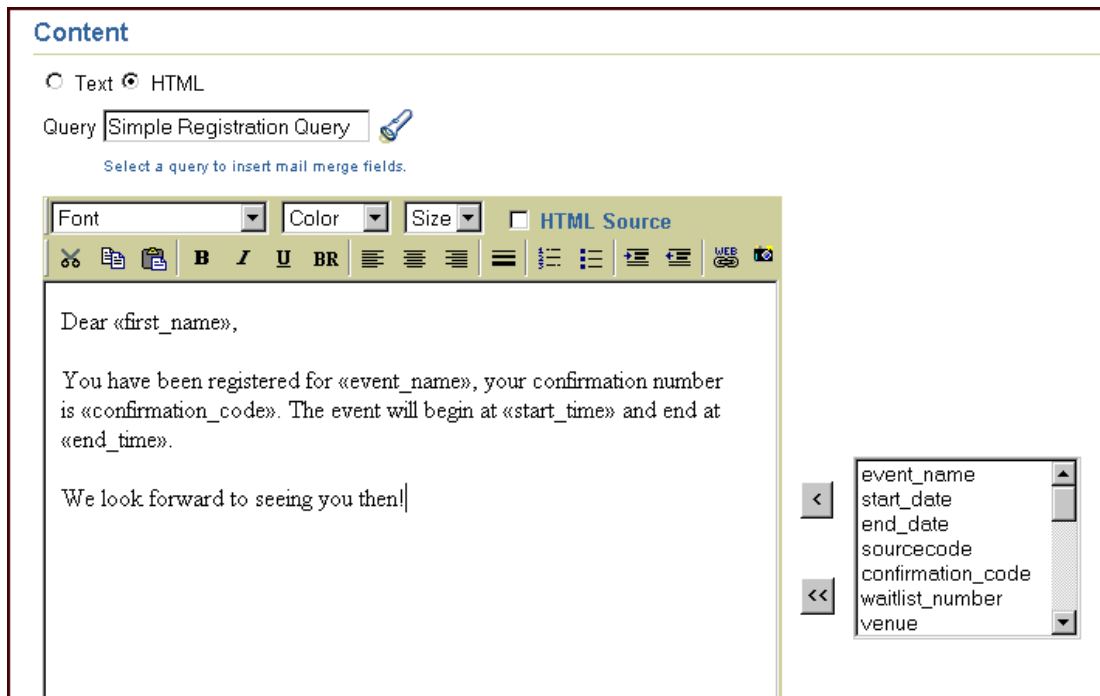
To create a Template, follow this procedure:

Prerequisites

Profile option **AMS: Enable Fulfillment** is set to **Yes**

Steps

1. Log in to Oracle Marketing
2. Navigate to Administration > Marketing > Fulfillment > Template.
3. Select Create Template.
4. In the General Information section, fill in the following details:
 - **Name:** This field is mandatory. Enter a template name, for example, Event Registration.
 - **Owner:** This field is optional. Enter an owner name, or use the flashlight icon to select an owner name.
 - **Directory:** This field is optional. The values for directory come from Oracle Content Manager (OCM). For more information on the content types in this directory see [Section 3.6.1.1, "Understanding the Oracle Marketing Root Directory"](#) When a template is being created, the must specify what directory the content should be placed in. Once a template is created, the user cannot move it the field becomes read-only.
 - **Character Set:** This field is mandatory. This LOV allows you to select the character set for which this cover letter will use. For example, West European (ISO).
5. In the Content section fill in the following details:
 - **Text or HTML:** When creating a template, you can build the content using a simple Text editor, to enable this select "Text". However, if you'd like to create it using an HTML iFrame text box (includes formatting parameters, etc.) then select "HTML".
 - **Query Type:** Click the flashlight icon to select a query type for this cover letter. The query type allows you to insert mail merge fields. For more information on Event queries see [Section 3.6.5.1, "Seeded Event Queries"](#), for more information on Campaign queries see [Section 3.6.5.2, "Seeded Campaign Queries"](#).
6. Using the content creation frame, fill in text for the template. When applicable, use the mail merge tags (shown beside in smaller frame).

Figure 3–5 HTML iFrame with Query Tags

7. Select Apply to save changes.

The template will not be available until the status has been changed to **Approved**.

3.6.4.2 Adding Images to a Template

Images can be added to templates. If an image has been added, when the template is displayed, an image appears within the template body. Images are added using the iFrame content creation box, therefore, can only be added when using Internet Explorer.

To add images to a template use the following procedure:

Prerequisites

- Profile option JFT_FM_BASE_IMAGE URL is set to the same server value as your applications

- Template is created

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Fulfillment > Template.
3. Open the template.
The Template Schedule details page opens.
4. In the iFrame text box select the camera icon.
If using Netscape, the iFrame textbox is not available and therefore images can't be added.
5. Select the image upload location:
 - **File:** Select if uploading the image from a local file folder. Use the browse button to search for the image.
 - **URL:** Select is uploading the image from a URL. Indicate the full path name of the image.
For example, if using the Australian flag image found on the Oracle Store landing page, you will need to "View HTML source" on the page, and include the image source path: /OA_MEDIA/jtfaust.gif.
6. Select Preview to preview changes.
7. Select Apply to save your work.

3.6.5 Setting Up Fulfillment Queries

A fulfillment query is a SQL statement that collects data from the database. This data is merged into a template by using personalization tags defined by the query. The Query tags enable the template to dynamically fetch data. Query tags ultimately become SELECT statements that enable data to be retrieved from the database for the cover letter (template).

For Campaigns and Events, Oracle Marketing ships with seeded queries that contain the related mail merge tags. If these do not work for your business needs, you can create a custom query. For more information see [Section 3.6.5.4, "Creating a Custom Query"](#).

A query serves two purposes.

1. Determines which records meet the defined criteria.

2. Determines which fields of those records are returned. The returned data is merged with a template to create a customized e-mail for each recipient.

To implement fulfillment queries use the procedures below:

- [Section 3.6.5.1, "Seeded Event Queries"](#)
- [Section 3.6.5.2, "Seeded Campaign Queries"](#)
- [Section 3.6.5.3, "Associating Seeded Queries with Templates"](#)
- [Section 3.6.5.4, "Creating a Custom Query"](#)

3.6.5.1 Seeded Event Queries

Oracle Marketing seeds 4 Queries for Events. Each seeded query contains applicable mail merge tags. For example, the seeded Query for Event Registration has applicable mail merge tags: Event name, start date, end date, etc.

The following queries are seeded for Events:

- Registration
- Venue Change
- Date Change
- Cancelled

3.6.5.2 Seeded Campaign Queries

Oracle Marketing ships with 2 seeded queries for Campaigns:

- **Marketing Simple Query:** This query is designed to retrieve basic customer information from the AMS tables.
 - Query retrieves: title, first name, last name, pin code, party id, customer id, organization, e-mail, address, fax address, customer type, and source code.
 - Data is retrieved from the following tables: ams_list_entries, ams_act_lists, ams_campaign_schedules.
- **Marketing Detailed Query:** This query is designed to retrieve extensive customer information from the AMS tables.
 - Query retrieves: title, first name, last name, pin code, campaign source code, offer code, party id, customer id, list header id list id, address line1, address line2, city, state, zip code, country, fax address, phone, e-mail address, customer type.

- Data is retrieved from the following tables: ams_list_entries, ams_act_lists, ams_campaign_schedules, ams_campaigns, ams_act_offers.

3.6.5.3 Associating Seeded Queries with Templates

To create a query for a template, follow the procedure below:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Fulfillment > Template.
3. Select Create.
The Create Template page opens.
4. In the General Information section fill in the following:
 - **Name:** Provide a name for the template.
 - **Owner:** Select an owner for the template.
 - **Directory:** Choose cover letter.
 - **Character Set:** Indicate a character set for this template.
5. In the content creation frame choose a Query type. Select the flashlight icon to launch the Search and Selector.
6. Choose either Marketing Simple Query or Marketing Detail Query.
If a custom Query has been created, it can be selected here.
7. Select Apply to save your work.

3.6.5.4 Creating a Custom Query

To create a custom query, follow the procedure below:

Prerequisite

AMS: Enable Fulfillment is set to **Yes**

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Fulfillment > Query.
3. Select Create Query.
4. Add a Query name.
5. Add a Query Description.
6. Add specific SQL statements to meet your custom query business requirements.

When creating SQL statements for a custom Query it is required that you include the bind variables found in the Marketing Simple Query and Marketing Detail Query.

- Marketing Simple Query bind variables: :schedule_id
- Marketing Detailed Query bind variables: :schedule_id

7. Select Apply to save your changes.

The Query is not active until the status is Approved.

3.6.6 Setting Up Fulfillment Rules

When creating Templates for Events, you must set up Fulfillment rules. These rules, are created to link objects and actions to Cover Letters. When creating fulfillment rules, it is important to note that Events Letters can only use events tokens, specifically, the **event_reg_id** token must exist in the query.

For Events, the following actions are seeded:

- Send a letter on Event enrollment or registration.
- Send a letter on Event registration cancellation.
- Send a letter when registration status changes from waitlist to confirmed.
- Send letters to Event roster when an Event is cancelled.
- Send letters to Event roster when the date of the Event is changed.
- Send letters to Event roster when the venue for the Event is changed.
Letters will not be sent if a venue is removed from the Event.

To implement fulfillment rules, follow this procedure:

Prerequisites

Template has been created

Steps

1. Navigate to Administration > Marketing > Setup > Fulfillment Rules.
2. In the Object Column LOV, choose Event Schedule.
3. In the Action Column LOV, choose an Action. The available Actions (seeded) for Event Schedules are:
 - Event Cancellation
 - Event Date/Time Change
 - Registration Cancellation
 - Registration Confirmation
 - Venue Change
 - Wait List Confirmation

Custom Actions are not currently supported.

4. Enter a Subject.
5. Click the icon next to the Cover Letter and select a Cover Letter from the available cover letters created in Oracle Fulfillment.
6. Click Update.
7. To preview the template, click the icon in the Preview column.

3.7 Setting Up Offers

Offers may exist on their own or they can be associated with different marketing objects. When implemented in Oracle Marketing (without implementing Trade Management), Offers are generally associated with Campaigns and Campaign Schedules.

When Trade Management is implemented, Oracle Marketing's Offer functionality is enhanced to include claims that can be recorded against an Offers.

Use the following procedure to set up Offers:

- [Section 3.7.1, "Setting System Profiles for Offers"](#)
- [Section 3.7.2, "Creating and Verifying Lookups for Offers"](#)

- [Section 3.7.3, "Running Concurrent Programs for Offers"](#)

Prerequisites

Advanced Pricing is implemented

3.7.1 Setting System Profiles for Offers

Based on your business requirements, set the following system profiles for Offers.

Table 3–11 System Profiles for Offers

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.
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.
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.

Table 3–11 System Profiles for Offers

Option	Required	Level	Setting	Effect/Limitation
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.
AMS : Default Forecast UOM	Required	Site	Select from a defined UOM	This value is used to calculate the initial base sales for a Forecast. Users can override this default value on the Forecast page.
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).

Table 3–11 System Profiles for Offers

Option	Required	Level	Setting	Effect/Limitation
QP : Item Validation Organization	Yes	Responsibility	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	Responsibility	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.

3.7.2 Creating and Verifying Lookups for Offers

Use the following table when creating and verifying lookups for Offers:

Table 3–12 Lookups for Offers

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

Table 3–12 Lookups for Offers

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_QP_ARITHMETIC_OPERATOR	System	% Amt Lumpsum Newprice	Percent Amount Lump sum New Price
AMS_QP_VOLUME_TYPE	System	Pricing_Attribute10 Pricing_Attribute12	Quantity Amount

3.7.3 Running Concurrent Programs for Offers

Run the following concurrent programs for offers:

- **AMS-TM: Adjust Backdated Offer:** This programs takes the new Offer terms and recalculates the parameters of the Offer retroactively to the start date.

- **AMS-TM: Refresh of Base Sales Materialized View:** This program takes data from Order Management and loads it into Oracle Marketing. It loads into the following materialized tables:
 - ams_base_sales_mv
 - ams_actual_sales_mv

3.8 Setting Up Lists

Lists contain information on prospects, customers, and event registrants. Lists may be sourced internally from the Trading Community Architecture database (TCA) or externally through List Import or Oracle Discoverer. Lists are used for the following purposes:

- **Campaign Schedules:** Executing a campaign action based on a particular set of customers.
- **Events:** Managing an event based on a created invitation list.
- **Offers:** Limiting Offers to a particular marketing target.

For List Management purposes, you must import the Oracle Marketing End User Layer (EUL) that contains the Oracle Marketing business areas. Once imported, the Oracle Marketing business areas are available for List Management.

After performing the following procedure, Oracle Discoverer launches with a single sign-on from within Oracle Marketing:

- [Section 3.8.1, "Setting System Profile Options for Lists"](#)
- [Section 3.8.2, "Creating and Verifying Lookups for Lists"](#)
- [Section 3.8.3, "Creating the Discoverer End User Layer"](#)
- [Section 3.8.4, "Importing Discoverer EUL"](#)
- [Section 3.8.5, "Running Concurrent Programs for Lists"](#)

3.8.1 Setting System Profile Options for Lists

Set the following profile options for Lists:

Table 3–13 Profile Options for Lists

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.

3.8.2 Creating and Verifying Lookups for Lists

This procedure will populate the LOV for the List functionality.

Table 3–14 Lookups for Lists

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 Standard Update Update No Purge	New entries added, old entries not deleted, entries not updated. All old entries deleted, new entries added. New entries added, old entries not meeting criteria deleted, entry information updated. 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.
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.

Table 3–14 Lookups for Lists

Key	Type	Seeded Values	Meanings
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.

3.8.3 Creating the Discoverer End User Layer

Oracle Discoverer must be implemented prior to implementing the following functionality. Use the procedures below to create a database user and give the appropriate Applications (APPS) grants to that user. After performing this procedure, the End User Layer (EUL) for Discoverer is set for all APPS.

For specific information about Installing Oracle Discoverer, see *Oracle iAS9i Installation Guide* and *iDS9i Installation Guide*.

To create the Oracle Marketing EUL for Discoverer use the following procedure:

Prerequisite

- Oracle Discoverer is installed
- Oracle Marketing is installed

Steps

1. Open a DOS prompt.
2. Navigate to the directory where Oracle Discoverer Admin edition is installed. For example, if Oracle Discoverer Admin is installed in D:\orant\discvr4, type:

a) d:

b) cd \orant\discvr4

3. If the database schema has not previously been created, run the following:

```
dis4adm.exe
```

```
/CREATE_EUL
```

```
/APPS_MODE
```

```
/CONNECT system/manager@tst115rw (enter in your password and TNS  
Name entry in place of "manager" and "tst115rw" respectively).
```

```
/USER eul4_us
```

```
/PASSWORD eul
```

```
/DEFAULT_TABLESPACE user_data (enter your tablespace names in place  
of "user_data")
```

```
/TEMPORARY_TABLESPACE temp (enter your tablespace name in place  
of "temp")
```

```
/SET_EUL_LANGUAGE US
```

```
/APPS_GRANT_DETAILS apps/apps (enter your Oracle Applications  
Foundation username and password for "apps" and "apps" respectively).
```

```
/SHOW PROGRESS
```

4. If the database schema has previously been created, run the following:

```
dis4adm.exe
```

```
/CREATE_EUL
```

```
/APPS_MODE  
/CONNECT eul_us/eul_us/eul@tst115rw (The "eul_us" should be the  
name of the database schema previously created.)  
/APPS_GRANT_DETAILS apps/apps (username and password)  
/SHOW_PROGRESS
```

3.8.4 Importing Discoverer EUL

Use the following procedure to import the Oracle Marketing End User Layer (EUL) that contains the Oracle Marketing Business Areas. Once imported, the Oracle Marketing Business Areas are available for List Management. Alternatively, you may manually import the EEX files from the Oracle Discoverer Admin interface.

- For more information on functional Business Areas see *Oracle Marketing User's Guide*.
- For more information on how to manually import see *Oracle Discoverer Administration Guide*.

To import the Discoverer EUL follow the procedure below:

Prerequisites

- MKS Toolkit is implemented

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.

```
sh adupdeul.sh  
connect=<username/password{@<two_task>}  
resp=<APPS responsibility name>
```

```

gwyuid=<APPS GWYUID>
fndnam=<APPS FNDNAM>
secgroup=<APPS responsibility 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.
- 7. 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=[APP_SECURE]
 - **ICX_PROFILE ICX_DISCOVERER_VIEWER_LAUNCHER**
URL that points to the Discoverer Viewer

Example

http://machinename.domain/discoverer4i/viewer?cs=[APP_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)

3.8.5 Running Concurrent Programs for Lists

Run the following Concurrent Programs for Lists:

Table 3–15 Concurrent Programs for Lists

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.

Table 3–15 Concurrent Programs for Lists

Concurrent Manager	Required	Description
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.
Workflow Background Process	Required	The System Administrator must run this program. It populates List generation and target Group Generation data. Parameters: Item Type: AMS List Generation Process Deferred: Yes Process Timeout : yes Process Stuck: yes Ignore Minimum and Maximum Thresholds

3.9 Setting Up List Import

List Import is an Oracle Marketing feature that facilitates importing lists of prospects and their related information from outside sources.

The following types of lists can be imported:

- Rented lists
- Purchased mailing lists
- Mailing lists from merged or acquired organizations
- Mailing lists provided by internal or external sales people

Using the List Import feature lists may be added directly to TCA tables. When importing from a purchased list, data is stored in the TCA schema. However, when importing from a rented list data is not stored in the TCA schema. For more information see *TCA Best Practices White Paper*.

List Import Functionality Overview

The Oracle Marketing List Import feature supports many different business requirements. For example, Event registration can be automatically executed from List Import. Additionally, List Import supports Lead import functionality. Used in this manner, leads can be passed from Oracle Sales Online to Oracle Marketing automatically.

When performing List Import, B2B or B2C data is imported into the Marketing and TCA tables. When importing the data, you can directly import into TCA or you can choose to preview it first.

Marketing import tables:

- AMS_IMP_LIST_HEADERS_ALL
- AMS_IMP_SOURCE_LINES
- AMS_PARTY_SOURCES

TCA import tables:

- HZ_PARTIES
- HZ_LOCATIONS
- HZ_PARTY_SITES
- HZ_CONTACT_POINTS
- HZ_ORG_CONTACTS

To implement List Import use the following procedures:

- [Section 3.9.1, "Creating the Bin Directory"](#)
- [Section 3.9.2, "Setting System Profiles for List Import"](#)
- [Section 3.9.3, "Verifying Lookups for List Import"](#)
- [Section 3.9.4, "Running NFS Mount"](#)
- [Section 3.9.5, "Performing Existence Checking"](#)
- [Section 3.9.6, "Creating Deduplication Rules for List Import"](#)
- [Section 3.9.7, "Importing Lists from XML or CSV Files"](#)
- [Section 3.9.8, "Setting Up Lists for Universal Work Queue"](#)
- [Section 3.9.9, "Creating a List from an External Data Warehouse"](#)

3.9.1 Creating the Bin Directory

Using this procedure, a location for the SQL loader control file is created.

Prerequisites

SQL Loader is installed

Steps

1. Launch a DOS prompt.
2. Create the Bin Directory 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.

3.9.2 Setting System Profiles for List Import

Set the following profile options for List Import:

Table 3–16 List Import Profile Options

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: (\$AMS_TOP/bin/). For the data file you may also set a different path to where the data is kept. 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. The system may create duplicate records if this profile is not set to Yes.
AMS : Implement Client File Size	Yes	Site	Numeric value	Default value is1000000. For Oracle Marketing List Import functionality, this value sets the file size limit in terms of bytes that can be uploaded by client.

Table 3–16 List Import Profile Options

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.

3.9.3 Verifying Lookups for List Import

Use the following table for Lookups, types, values, and meanings.

Table 3–17 List Lookups

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.
		Duplicate	Duplicate record found
		Incompdump	Incomplete-Duplicate found
		Incompdumperr	Incomplete-Duplicate-Error found
AMS_IMPORT_TYPE	System	Incomperr	Incomplete-Error found
		B2B Customer	Organizations, Contacts, Address
		B2C Customer	Persons, Addresses
		Event	Event Registration
		Lead	Leads

3.9.4 Running 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.

3.9.5 Performing Existence Checking

Existence checking enables pre-defined rules to be established. This is only possible when **AMS : HZ DEDUPE RULES** profile is set to **YES** at site level. Existence checking enables the process of deduplicating import records from the TCA model.

Existence Checking for Persons

Existence checking is based on Person First Name, Person Last Name, Email Address, Phone Country Code, Phone Area Code, Phone Number, Address and Country.

First checks are done to see if the person exists with a provided E-mail address. If it does not exist then it checks with First Name and Last Name with phone attributes. If this fails then it looks for First Name and Last Name with address attributes. If this does not exist, then a new Person record is created (Party of type "Person").

Existence Checking Using Original System Reference

Original system reference is a target field that has been added to the List Import process. This affects the existence checking logic in the following way:

- **Organizations (B2B):** If original system reference is mapped, existence checking will use this value along with organization name and other attributes, such as Address1 and Country to find the exact match. If it is unable to find matching record then existence checking is done without the Original System Reference column.
- **Organization Contacts (B2B):** If original system reference is mapped then existence checking will use this along with Organization Name, Person First Name, Person Last Name and other attributes, such as E-mail Address, Phone Area Code, Phone Number and Phone Extension to find the exact match. If it is unable to find matching records then the existence checking will be done without the original system reference column.
- **Persons (B2C):** If original system reference is mapped then existence checking will use this along with Person First Name, Person Last Name and other attributes like Address1, Country, Email Address, Phone Country Code, Phone Area Code and Phone Number to find the exact match. If it is unable to find

matching records then the existence checking will be done without the Original System Reference column.

3.9.6 Creating Deduplication Rules for List Import

De-duplication rules check for List Import duplications. For example, deduplication rules can be created (for e-mail addresses, first name, last name, etc.) preventing duplicate information showing up in the List Import.

De-duplication rules must be established prior to sending data to the TCA APIs. Therefore, when a List Import is ran, if there are two of the same records found in the csv or xml file with the same e-mail address, deduplication will catch the error. In this example, the second record is created as a duplicate and only the first record will be processed for import.

To create deduplication rules follow the procedure below:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Audience > Deduplication Rules.
3. Enter a Name.
4. Enter a Description.
5. Select Update.
The page refreshes.
6. Select the link for the rule created in Step 3.
7. Select a table column for this rule to check for duplicates.
8. Click Update.

3.9.7 Importing Lists from XML or CSV Files

Marketers have the ability to import lists from a xml or csv file into Oracle Marketing. Based on the type of imported list data, the Import Wizard will walk a marketers through the steps.

XML Import

The xml import is available for the following:

- Organization
- Person
- Addresses
- Person addresses import

The xml import file must be in zip format. The zip must contain the following:

- **XML File:** This contains the B2B or B2C customer information, it can be in any format.
- **DTD File:** This file formats the xml data. For example, if the xml file contains a tag “address” the dtd file will format the tag into “address = city + state + zip” for the application.

B2B and B2C CSV List Import

A csv import can be performed for any B2B or B2C type of import. For more information on how to perform a List Import, using xml or csv see the *Oracle Marketing User's Guide*.

Oracle Marketing also supports a recurring import - an import process that is rescheduled for a later time. This option is available for server and ftp imports. The user must change the data in the file otherwise import will repeat the same data available in the files.

For more information on B2B and B2C list import fields see [Section D, "List Import Fields"](#)

3.9.8 Setting Up Lists for Universal Work Queue

When Oracle Marketing is integrated with Oracle Telesales, the List Import feature can be used to assign lists to TeleSales Agents. In this scenario, a TeleSales agent can log into Oracle TeleSales Universal Work Queue and access a list of customers

assigned to them by the marketing team. This enables a list of prospects collected in marketing to be followed up on by the sales team.

To set up List Import for Universal Work Queue follow the procedures:

- [Section 3.9.8.1, "Setting List Import and Work Queue Profiles"](#)
- [Section 3.9.8.2, "Implementing List Import for Telesales"](#)
- [Section 3.9.8.3, "Selecting the List in Telesales"](#)

3.9.8.1 Setting List Import and Work Queue Profiles

To enable the list to be displayed in Universal Work Queue the following profiles must be set:

- **AMS: Queue: Marketing Lists – Manual Assignment** at Site or Application level. This profile determines if a Telesales user can work on Marketing Lists – Manual Assignment.
- **AMS: Queue Order: Marketing Lists – Manual Assignment** at Application or Site Level. Choose a display order of 1-56. This profile determines the order of appearance for the “Marketing List – Manual Assignment” in the work queue in relation to the other Queue Order Profiles.

3.9.8.2 Implementing List Import for Telesales

To set up the List Import for Universal Work Queue use the following procedure:

Prerequisites

- User has TeleSales Agent Responsibility
- A csv file with the Sales Agent (i.e. the application login id for the sales agent) column is populated
- A Telemarketing Campaign Schedule has been created in Oracle Marketing

Steps

1. Log in to Oracle Marketing.
2. Navigate to Audience > Import.
Use this page to import data from the csv file.
3. Using the Import Mapping section, map the sales agent column from the Source Column to the “Sales Agent ID” target field column.

The Sales Agent ID is the application login id for the sales agent(s).

4. Import the data into Oracle Marketing.
5. Generate a list using the imported data.
6. Associate the generated list to the Telemarketing Schedule created within Oracle Marketing.
7. Generate the target group for this Telemarketing Schedule.

3.9.8.3 Selecting the List in Telesales

After the list has been created in Oracle Marketing it is available for use in Oracle Telesales. Use the following procedure to verify that the list has been properly implemented.

Prerequisites

- User has TeleSales Agent Responsibility

Steps

1. Log in to Oracle Telesales.
2. Navigate to the Universal Work Queue tab.
3. Select the Marketing List – Manual Assignment from the Work Type drop down.
4. View the lists that have been assigned to you from Oracle Marketing.

3.9.9 Creating a List from an External Data Warehouse

To create and manage lists against an external data warehouse use the following procedure:

- [Section 3.9.9.1, "Creating an End User Layer in Discoverer"](#)
- [Section 3.9.9.2, "Creating a Data Source"](#)
- [Section 3.9.9.3, "Creating a New Discoverer Workbook"](#)
- [Section 3.9.9.4, "Associating Workbook to List"](#)

3.9.9.1 Creating an End User Layer in Discoverer

You must create a Discoverer End User Layer for the Data Warehouse schema. When creating the EUL, you will insert an extra column for the third-party external data that is being mapped.

3.9.9.2 Creating a Data Source

To enable the external data to be visible in Oracle Marketing, you must create a data source for it.

To create a new data source follow the procedure below:

Prerequisites

- Discoverer End User Layer for the third party data has been created
- An extra column for the third-party data has been created

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Audience > Data Sources.
3. Select Create.
The List Source Types page opens.
4. Enter the following information:
 - **List Source Name:** For this Data Source the List Source Name should be the same as the name of the extra column created in step [Section 3.9.9.1, "Creating an End User Layer in Discoverer"](#) (i.e. Data_Warehouse).
 - **Object Name:** Name of the object within the database providing the data.
 - **Primary Key:** Select the unique identifier for the external data. This can be a table or view in the third-party data source.
 - **Description:** Optionally, enter a brief description.
5. Select Create.
The List Source Types page opens.
6. Map the Source Field Name to the corresponding List Field Name.
By doing this, you are mapping the external data fields to the appropriate Oracle Marketing fields. The data is mapped into the AMS_LIST_ENTRIES

table. You can also provide a label for the Source Field (Source Field Meaning). Repeat step 6 as necessary.

7. Select Update.

3.9.9.3 Creating a New Discoverer Workbook

Using Discoverer, you will create a Workbook that includes the extra column you created previously.

To create a Discoverer Workbook that includes the extra column, use the following procedures:

1. Log in to Oracle Marketing.
2. Navigate to Audience > Discoverer.
The Workbook Wizard dialog box launches.
3. Select Create a New Workbook.
4. Select one of the following display preference. Instructions in the section are based on “Table” selection.
 - **Table:** Displays data in columns.
 - **Crosstab:** Displays data in both rows and columns. Allows you to pivot items across the top and side axis.
 - **Page-Detail Table:** Displays data in columns grouped by the items in the page axis.
 - **Page-Detail Crosstab:** Displays information in both rows and columns grouped by item in the page axis.
5. Select Next.
6. Select the target table from the Available LOV.
The respective columns will display in the Available window.
7. Highlight the target column, and select the Shuffle icon to move to the Selected Column.
8. Select Next.
9. Use the Table Layout page to change the column layout for the worksheet. This step is optional.
10. Select Next.

11. Use the Format page to change a data heading or format. This step is optional.
12. Select Next.
13. Use the Conditions page to create conditions for your data, this will limit worksheet results. Use this sheet to specify criteria. This step is optional.
14. Select Next.
15. Use the Sort page to define criteria by which you will sort column in the worksheet. This step is optional.
16. Select Next.
17. Use the Calculations page to add new information to your worksheet results. This step is optional.
18. Use the Percentages page to further analyze your data. This step is optional.
19. Select Next.
20. Use the Totals page to summarize your results. You can use any standard function - sum, average, minimum, maximum, standard deviation, and variance.
21. Use the Parameters page to create a parameter to act as a placeholder for a value in a condition or calculation.
22. Select Finish.

Discoverer will query the specified data and create the workbook.

3.9.9.4 Associating Workbook to List

After creating the new workbook next you will associate the workbook to the list created.

Prerequisite

List has been created

Steps

1. Log in to Oracle Marketing.
2. Navigate to Audience > List.
The List page opens.
3. Select Create.

The Create List page opens.

4. Fill in the following information:
 - **List Name:** Provide a unique list name.
 - **Type:** Choose a type from the drop-down menu.
 - **Source Type:** Using the drop-down menu select the data source created previously.
5. Select Create.
6. Return to Audience > List.
7. In the List Summary section, select the list just created.
8. Select Selections.

The List Selection page opens.

9. Fill in the following mandatory information:
 - **Order:** Select the order.
 - **Operation:** Select the appropriate operator for this list.
 - **Type:** Using the drop-down menu select Workbook.
 - **Name:** Select the flashlight icon to launch the Workbook Selector Navigator. Select the workbook created previously.
10. Select Update.
11. Select Generation (from the side navigation menu).
12. Select Generate Immediately.
13. Select Update.

To generate the List, you must run the workflow background process. This requires AMS: List Generation as a parameter.

14. After running this concurrent program, you will have a generated list using an external Data Warehouse/third-party data source.

3.10 Setting Up Products

Implementing Products provides marketer's the ability to create, promote, and manage Products for Oracle Marketing. Products are stored in Oracle Inventory enabling a marketer to tie various marketing objects to specific Products or product

families. Products may be used with the following marketing objects -- Campaigns, Events, Offers, and Deliverables. Products are stored in the `mtl_system_items_b_kfv` `mtl_system_items_tl` tables.

Two types of Products can be created:

- **Inventory Items:** These include tangible items such as books, clothing, appliances, and computers.
- **Service Items:** Currently, warranties, subscriptions, and contracts are supported as a newly created service product.

Oracle Marketing provides the following product definition features:

- Ability to create a new product or service
- Define basic product attributes
- Define product relationships
- Define product revision
- Ability to assign price lists to Products
- Ability to assign Offers to Products
- Define competitor Products
- Define product bundle components
- Display and search for existing Products
- Associate product to categories and category sets
- Ability to assign attachments and notes to Products

Prior to using Products in Oracle Marketing, Oracle Inventory must be implemented, for more information see *Oracle Inventory Implementation Guide*.

If planning to use product bundles, Oracle Bill of Materials must be implemented. For more information see *Oracle Bills of Material User's Guide*.

To implement Products use the following procedure:

- [Section 3.10.1, "Validating Inventory Organization for Products"](#)
- [Section 3.10.2, "Setting System Profiles for Products"](#)
- [Section 3.10.3, "Validating Item Validation Organization"](#)
- [Section 3.10.4, "Creating and Verifying lookups for Products"](#)
- [Section 3.10.5, "Running Concurrent Programs for Products"](#)

- [Section 3.10.6, "Recompiling Key Flexfield Segments"](#)
- [Section 3.10.7, "Implementing Product Templates"](#)

3.10.1 Validating Inventory Organization for Products

Oracle Inventory must be properly implemented before using the Product Pages in Oracle Marketing. The Master Inventory Organization assigned will appear by default in the Oracle Marketing Product Pages. When creating new Products, they will be placed into the default Master Inventory Organization.

Set the profile **AMS : Item Validation Organization** to the default Master Inventory Organization for which Products will be selected from and created to.

3.10.2 Setting System Profiles for Products

Set the following profile option for Products:

Table 3–18 Product Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS : Inventory Item Update Allowed	No	Site	Yes/No	Seeded value is No. By default, a Marketer is able to update Products created within the Oracle Marketing application. However, if a Marketer wants to be able update Products from Oracle Inventory, set this value to Yes at Site level.
AMS : Item Validation Organization	Yes	Site		Indicates the default Master Inventory organization for which Products will be selected from or created to.

3.10.3 Validating Item Validation Organization

This step applies only if implementing Oracle iStore with Oracle Marketing.

Set **AMS: Item Validation Organization** and **IBE: Item Validation Organization** profiles at site and application levels to the same Master Inventory Organization.

For more information about how iStore uses the IBE: Item Validation Organization profile option to derive its product database, see the *iStore Implementation Guide*.

If the two Item Validation Organization profile options do not match at the same levels, then the Create Product button will not be display in the Store

Administration UI's Catalog > Products menu. However, the iStore administrator still will have view and update privileges for Products within the inventory organization of the IBE: Item Validation Organization profile option at its lowest-level setting.

For example, if you set the IBE: Item Validation Organization profile option at the iStore administrator responsibility level, then the Create Product button will be disabled, since it is not possible using out-of-the-box functionality to set the AMS: Item Validation Organization profile option at responsibility level. However, the iStore administrator still will be able to view and update Products within the inventory organization specified in the IBE profile option at the responsibility level.

3.10.4 Creating and Verifying lookups for Products

Use the following Lookups for Products:

Table 3–19 Lookups for Products

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

3.10.5 Running Concurrent Programs for Products

If there has been a change in the flexfield structure, compile the Inventory System Items Flexfield and the Inventory Category Flexfield prior to running this concurrent program.

Run the concurrent program listed below to load the Oracle Inventory categories information into the Oracle Marketing database tables. This allows the appearance of current product categories data in the Oracle Marketing pages.

You only need to run the concurrent program after you create new categories in Oracle Inventory.

Table 3–20 *Profile Option for Products*

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.

3.10.6 Recompiling Key Flexfield Segments

In Oracle Applications, key flexfields (KFFs) are customized fields used to enter multi-segment values such as part numbers, account numbers, etc.

You must recompile the key flexfield segments -- only once -- after creating them. If you do not perform this step, part numbers will appear as X in the Products pages.

Following are quick steps to recompile the KFF segments. For more information, see the *Oracle Inventory User's Guide*.

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Application > Flexfield > Key > Segments.
3. Query on:
 - **Application:** Oracle Inventory
 - **Flex Title:** System Items (MTL_SYSTEM_ITEMS_B_KFV)
4. Select Unfreeze.
5. Select Freeze.
6. Recompile the key flexfield by selecting the Compile button.

For general information on DFFs, see the *Oracle Application's User's Guide*.

3.10.7 Implementing Product Templates

Product Templates enable a marketing Administrator to configure product attributes. Configurable Product Options enable the marketer to define at time of installing Oracle Marketing, the list of product attributes to be displayed in the inventory options side navigation menu for any responsibility.

This allows customization of a list of product attributes based on business needs and integration requirements. Oracle Marketing provides a default template based on whether you are defining a product or a service. Selecting or de-selecting the desired product attributes can override the template.

You can define the list of product attributes for each responsibility and you can also specify if the product attributes are editable in the inventory options page. This feature allows you to isolate product attributes and limit their access to the appropriate users in accordance with business and integration requirements. This feature was added as an Enhancement request for Oracle iStore and Oracle Service Online.

Oracle Marketing Product Templates are different from inventory templates. Templates created here are used only in Oracle Marketing screens, which gives the user an option to configure the product attributes, which are displayed in inventory option side navigation menu.

Logical process of creating templates:

1. Create Product Templates - choose Service or Product Type.
2. Associate responsibility to the template.
3. For each product attribute select whether the attribute is defaulted, editable or hidden.
4. Depending on the responsibility of the user creating the product the templates associated to that responsibility will be implemented. If no templates are associated to the user, the default-seeded template is used.

To create and enable a new template, use the following procedure:

- [Section 3.10.7.1, "Creating a New Product or Service Template"](#)
- [Section 3.10.7.2, "Setting up the New Template"](#)
- [Section 3.10.7.3, "Selecting Product Attributes in Seeded Product Templates"](#)

3.10.7.1 Creating a New Product or Service Template

To create a new template use the following procedure:

1. Log in to Oracle Marketing.
2. Navigate to Administration > Setup > Product Option.
3. Select Create Product Template.
4. In the Create Product Template screen, enter the following:
 - **Template Name:** Enter a unique, descriptive name for the template.
 - **Type of template:** Select the radio button for either a **Product** or **Service** template. When selecting a type, the PRODUCT_SERVICE_FLAG flag from AMS_PROD_TEMPLATES_B which will have value P/S. Depending upon the value, meaning it is retrieved from the ak_region_items/_tl.
 - **Description:** Optionally, enter a description for the template.
5. Select Apply to save your work.
A confirmation message is displayed.

3.10.7.2 Setting up the New Template

Set up the new template as follows:

1. Log in to Oracle Marketing.
2. Navigate to Administration > Setup > Product Option.
The Product Template Details page displays.
3. Select the hyperlink of the new template in the Product Templates screen.
4. In the Responsibilities block, select the flashlight icon to retrieve the Marketing responsibility which will link to the template. Only one product template and one service template can be assigned to a responsibility.
Optionally, remove an assignment.
5. In the Attributes block, set the following parameters for each attribute.
 - **Default:** Select this to make an attribute the default when a product is created.
 - **Editable:** Select this to make an attribute updatable in the product screens. This field overrides the Hide field. If you select Editable, Hide is ignored.

- **Hide:** Select this to make the attribute hidden in the product screens. This is overridden by a selected Editable parameter.
- **Select All:** Select this flag to enable all the attributes belonging to a selection default and edit enabled.

6. Select Apply to save your work.

3.10.7.3 Selecting Product Attributes in Seeded Product Templates

Different Inventory attributes can be assigned to a product, depending upon the type of product created -- Inventory or Service. If an Inventory product has been created, the attributes screen will display the specific Inventory and Order Management attributes; if the Service option has been selected, the specific Service default attributes will be displayed. The tables in this section list the seeded attributes for each of the two seeded product templates:

- Product (Inventory) Template
- Service Template

See the *Oracle Marketing User's Guide* for more information on seeded Templates for Products and Service Attributes.

3.11 Setting Up 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.

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.

Oracle Quoting-Forms, Oracle Order Management, and Oracle Advanced Pricing must be implemented prior to setting up price lists.

To implement price lists in Oracle Marketing, follow these procedures:

- [Section 3.11.1, "Setting System Profile Options for Price Lists"](#)
- [Section 3.11.2, "Creating and Verifying Lookups for Price Lists"](#)

3.11.1 Setting System Profile Options for Price Lists

Set the following profile options for price lists:

Table 3–21 Price List Profile Options

Option	Required	Level	Setting	Effect/Limitation
QP: Item Validation Organization	Yes	Responsibility	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	Responsibility	Yes/No	Selecting Yes will allow Price lists created using Advanced Pricing to be edited in Oracle Marketing. See also QP: Source System Code
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.

3.11.2 Creating and Verifying Lookups for Price Lists

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

Table 3–22 Lookups for Price Lists

Key	Type	Values	Meanings
AMS_PRICE_LIST_STATUS	System	Active Draft Rejected Pending Cancelled	Active Draft Rejected Pending Budget Approval Cancelled

3.12 Setting Up Deliverables

Deliverables are hard or soft, electronic collateral that is transmitted to a customer, prospect or an Event registrant. Deliverables may also be collected into a kit by defining a Deliverable as a kit and then adding other deliverables to the kit. Deliverables are utilized by both Campaigns and Events. 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. Physical Deliverables created as inventory items may be priced using Oracle Pricing in Oracle Marketing.

To implement Deliverables in Oracle Marketing follow these procedures:

- [Section 3.12.1, "Setting System Profile Options for Deliverables"](#)
- [Section 3.12.2, "Creating and Verifying Lookups for Deliverables"](#)

3.12.1 Setting System Profile Options for Deliverables

Set the following profile options for Deliverables:

Table 3–23 Profile Options for Deliverables

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.
AMS: Should Call to Inventory Modules be Made	Yes	Site	Yes/No	Indicates whether a Deliverable may be created as an Oracle Inventory item.
AMS: Should Call to Pricing Modules be Made	Yes	Site	Yes/No	Indicates whether a Deliverable may be priced.

3.12.2 Creating and Verifying Lookups for Deliverables

See the table below for lookups, types, values and meanings.

Table 3–24 Lookups for Deliverables

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

3.13 Setting Up Common Components

Use the following steps for implementing profile options, lookups, Concurrent Programs, and administrative functions that apply to Oracle Marketing's core/common components.

To implement common components, follow these steps:

- [Section 3.13.1, "Setting Profile Options for Common Components"](#)
- [Section 3.13.2, "Running Concurrent Programs for Common Components"](#)

3.13.1 Setting Profile Options for Common Components

Set the following profile options as they apply to your implementation:

Table 3–25 System Profiles for Common Components

Option	Required	Level	Setting	Effect/Limitation
AMS : System Timezone	Yes	Site	Select the timezone the central server is in.	This profile specifies the default timezone for the implementation. Timezones are defined in HZ_ TIMEZONES.
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	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	Displays fields that use UOM (for example, area in square feet).
AMS : UOM Length	Yes	Site	Depends on UOM Setup	Displays fields that use UOM (for example, length in feet).

Table 3–25 System Profiles for Common Components

Option	Required	Level	Setting	Effect/Limitation
AMS : UOM Quantity	Yes	Site	Depends on UOM Setup	Displays fields that use UOM (for example, units in each).
AMS : UOM Time	Yes	Site	Depends on UOM Setup	Displays 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.
AMS : Upgrade Complete	Optional	Site	Yes/No	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 set to Yes, the wildcard (%) will be allowed as the first character in a search string. If set to No, and the wildcard is entered as the first character, the system will give the user an error message.

Table 3–25 System Profiles for Common Components

Option	Required	Level	Setting	Effect/Limitation
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 homepage.

3.13.2 Running Concurrent Programs for Common Components

Run the following Concurrent Programs when implementing core components for Oracle Marketing.

Table 3–26 Concurrent Programs for Common Components

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.

Table 3–26 Concurrent Programs for Common Components

Concurrent Manager	Required	Responsibility	Description
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.

3.14 Setting Up Custom Setups

Custom setups dictate how an organization will use marketing objects. They enable an organization to use marketing objects to suit the organization's needs through customized, object specific Side Navigation menus.

For example, if a company decides to perform Direct Marketing Campaigns that always use e-mail as the delivery mechanism, a Custom Setup for the Marketing Object "Campaign Schedule" can be created. This custom setup would have the following attributes:

- Custom Setup Name: Direct Marketing - Email 14
- Associated with: Campaign Schedule (for the Campaign - Email Blast)
- Activity Type: Direct Marketing
- Activity: Email

Marketing Objects for which Custom Setups can be created:

- Campaign
- Campaign Schedule
- Collection
- Deal

- Deliverables
- Event
- Event Schedule
- Event Promotion
- Offer
- One-Off Event
- Price List
- Trade Promotion

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.

To implement and understand Custom Setups see the following sections:

- [Section 3.14.1, "Custom Setup Functionality Overview"](#)
- [Section 3.14.2, "Creating a Custom Setup"](#)
- [Section 3.14.3, "Setting Up Custom Setup Details"](#)

3.14.1 Custom Setup Functionality Overview

Custom setups control the following:

- **Side Navigation Menu:** The vertical menu which appears on the left hand side of the page once an object is created. 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. Menu items are the functional areas within the application where data can be created or where objects are viewed. Some of the menu items have functional implications, others are used for information purposes only.
- **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.

- **Seeded Menu Items:** The following is a list of objects you can create Custom Setups to be used with.
 - Main
 - Messages
 - Geography
 - Product
 - Deliverable
 - Budget
 - Team
 - Contact Point
 - Trigger
 - Schedule
 - Offer
 - Tasks
 - Notes
 - Partners
 - Cost and Revenues
 - Campaign Schedule
 - Metrics
 - Attachments
 - Theme Approval
 - Budget Approval
 - Market Eligibility
 - Products
 - Allocation
 - Checkbook

3.14.2 Creating a Custom Setup

When creating a custom setup you will associate the custom setup with a marketing object.

To create a Custom Setup use the following procedure:

Prerequisites

None

Steps

1. Navigate to Administration > Marketing > Setup > Custom Setup.
2. Select Create.
3. Enter a Custom Setup name.
4. Associate the Custom Setup with a marketing object. For a list of available marketing objects see [Section 3.14.1, "Custom Setup Functionality Overview"](#).
5. 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 Activity Type and Activity determines the available Component Groups and Menu Items. For example, Direct Marketing - Email has a different set of Component Groups and Menu Items as compared to Direct Marketing – Direct Mail.
 - 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. Custom Setups for Campaign Schedules depend on the relationship of Activity Type and Activity.
6. Check Active for the Custom Setup to be available for selection during a marketing object create.
7. Optional. Check Allow Essential and Optional Grouping if this Custom Setup can be used with the Side Navigation Look profile option.
8. Optional. Enter a suffix to be used as part of the source code.

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 is 3.

9. Optional. Enter a brief description for this Custom Setup.
10. Select Create.

3.14.3 Setting Up Custom Setup Details

After the Custom Setup has been created, use the following procedure to configure it:

Prerequisites

None

Steps

1. Navigate to Administration > Marketing > Setup > Custom Setup.
The Custom Setup overview page opens.
2. Select the Custom Setup created previously. For more information see [Section 3.14.2, "Creating a Custom Setup"](#).
The Custom Setup Details page opens. The combination of Menu Items displayed is based on the Marketing Object, Activity, and Activity Type combination selected when creating the Custom Setup.
3. Place a check in the Active Checkbox.
4. Place a check in the Allow Essential and Optional Groupings Checkbox.
5. Provide a brief description (optional).
6. In the Components section, provide the following details:
 - **Component Group:** Displays by default based on the Marketing Object, Activity, and Activity type selected for Custom Setup.
 - **Display Sequence:** Use this column to control the order of the marketing Objects (as they appear in the cue card). For example, if Products is to appear on the cue card directly below Main, Product should be sequentially numbered directly after Main. Main is not an optional setting and must be included. In this example, Main could be given a value of 10, and Product could be given a value of 11.
 - **Available Attributes:** Use this column to indicate if the attributes for this object should be made available.

- **Essential:** To control the display order of a particular Marketing Object, place a check in the Essential Checkbox (be sure to select the Essential checkbox that aligns with the correct Marketing Object). Anything not checked in the “Essential” column is considered “Optional” and is listed in alphabetical order.
- **Essential Display Sequence:** Display sequence is a numeric setting used to order Marketing Objects in cue cards. If the Essential Checkbox is checked, numeric values need to be provided enables the “Essential” Marketing Objects to be ordered appropriately. The Display Sequence column is used to determine the order when “Business Process View” profile value is selected.
- The following example displays how display parameters are rendered in the UI.

Figure 3–6 Custom Setup Display Sequence Parameters

Component Groups	Display Sequence	Component	Available Attributes	Essential	Essential Display Sequence	Show in Reports
Planning	10	Main	☒	☒	10	☐
	20	Message	☐	☐	20	☐
	30	Geography	☐	☒	30	☐
	0	Partners	☐	☐	0	☐
	40	Products	☐	☒	40	☐
	0	Deliverable	☐	☐	0	☐
	0	Budget	☐	☐	0	☐

- Reports: Place a check in the Reports checkbox to enable attributes to be shown in the portals.

7. Click Update.

3.15 Setting Up Categories

Categories are used to group objects. They can be used as selection and search criteria to locate objects. In some objects, for example, Budgets categories can be used to impose a business rule. Categories can be used in the following marketing functional areas:

- Deliverables
- Events
- Metrics
- Budgets
- Approval Rules

To understand and implement Categories see the following sections:

- [Section 3.15.1, "Deliverable Categories"](#)
- [Section 3.15.2, "Events Categories"](#)
- [Section 3.15.3, "Metrics Categories"](#)
- [Section 3.15.4, "Budgets Categories"](#)
- [Section 3.15.5, "Approval Rules and Categories"](#)
- [Section 3.15.6, "Setting Up Deliverables Categories for Custom Setups"](#)

3.15.1 Deliverable Categories

Categories are used by Deliverables to group items together. While creating a Deliverable it is mandatory to choose the category to which it belongs. Examples of Deliverable categories are:

- Collateral
- Creative
- Email

You can create sub-categories to further define Deliverables. For example, you can define greetings or confirmation as sub categories under the e-mail category. Email is a special category of Deliverables. These will be used by Campaign Schedules to send as e-mail when attached through the e-mail content screen in Campaign Schedules.

3.15.2 Events Categories

Categories are used with Events to group or categorize them. Examples of Event categories are educational Events or partnered Events.

3.15.3 Metrics Categories

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 ensures that the metric rolls up or is summarized to the metrics of the same category.

3.15.4 Budgets Categories

Budgets use categories to integrate to General Ledger. Budget categories can also be used to verify Budget eligibility for Campaign Schedules.

3.15.5 Approval Rules and Categories

Approval rules for Deliverables can be linked to Deliverable categories. Approval rule for Budgets can be linked to Budget categories. This means that all Budgets falling within that category would use that particular rule for approval when drawing money from those Budgets.

3.15.6 Setting Up Deliverables Categories for Custom Setups

Custom setups for Deliverables can be created for using Deliverable categories. Therefore, all deliverables using that category will use the custom setup created for the category attached.

To create a Deliverable for a custom setup, use the following procedure:

- [Section 3.15.6.1, "Create Category"](#)
- [Section 3.15.6.2, "Verify Category"](#)

3.15.6.1 Create Category

Use the following procedure to create a category.

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Categories.
3. Select Create.

4. Enter a Category Name.
5. Select a Parent Category if desired.
6. Select the Enabled checkbox to make the Category available.
7. Select a marketing object from the Created For drop-down menu.
8. Enter a description.
9. In case of metrics or Deliverables make sure the parent-child relationship is captured correctly.

Note: Oracle Marketing contains seeded categories for Deliverables and Events. Disable categories that are not needed.

3.15.6.2 Verify Category

Use the following procedure to verify that a category is properly implemented:

Prerequisite

Category has been set up

Steps

1. Log in to Oracle Marketing.
2. Navigate to the Deliverable tab.
3. Select Create.
Verify that the Category and Subcategory fields display values in the drop down menu.
4. Navigate to the Events tab.
5. Select Create.
6. Create an Event.
7. Navigate to the Categories item on the Side Navigation Menu.
Verify that Category field displays values in the drop down menu.
8. Navigate to the Administration > Marketing > General > Metrics.
Verify that the Category field displays values in the drop down menu.

3.16 Setting Up Marketing Mediums

Marketing Mediums relate to a specific channel used to execute a Campaign. Therefore, they differ by activity. Certain execution channels, such as Oracle Advanced Outbound, require particular Marketing Mediums to be selected for a Campaign Schedule.

For example, a Valentine's Day direct mail Campaign has a primary Campaign Schedule. The Campaign Schedule includes an activity type of direct marketing, an activity of direct mail, and a Marketing Medium of direct mail house. In this example, the direct mail house is the chosen execution strategy for this Campaign. In other words, the Valentine's Day Campaign will be executed through the mail.

Use the following procedure to create Marketing Mediums used in Campaign Schedules.

Prerequisites

Campaign Schedule is created

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Marketing Medium.
3. Select Create.
4. Fill out the following required fields as they relate to Marketing Mediums.
 - **Marketing Medium Name:** This name should reflect the Campaign Schedule, activity type, and activity it will be associated with.
 - **Country:** Choose the appropriate country for the Marketing Medium.
 - **Activity:** Choose the appropriate activity for which this medium will support. For example, if the Marketing Medium is Direct Mail House, choose Direct Mail for the activity.
5. Select Create.

Confirmation text appear on the page indicating that changes are saved.

Figure 3–7 Marketing Medium

Marketing Medium

To create or update a Marketing Medium, input the required information and click Create or Update.

Create

Clear

*Marketing Medium Name

Valentine's Mailer

*Country

United States

Rating

Moderate

Activity

Direct Mail

Managed By

Smith, Ms. Elizabeth

*Active From Date

09/Mar/2003

(example: 15/Dec/2000)

Active To Date

11/Mar/2003

(example: 1

Resources

Preferred Vendor

Advantage Corp

Party

Description

* indicates required field

Create

Clear

3.17 Setting Up Activities

An Activity manages the relationship between an object’s Activity Type and the Marketing Medium.

To understand and implement Activities see the following sections:

- [Section 3.17.1, "Understanding Activity Types"](#)
- [Section 3.17.2, "Seeded Activities and Activity Types"](#)
- [Section 3.17.3, "Setting Up an Activity"](#)

3.17.1 Understanding Activity Types

Available activity types are:

- Advertising
- Direct marketing
- In-store
- Press and analyst relations

The Activity page within the Administration tab manages the relationship between an object's Activity Type, Activity and available Marketing Medium. Using this page, an organization can specify the available Activity and Marketing Mediums combination for a given Activity Type.

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

3.17.2 Seeded Activities and Activity Types

The following is a list of seeded activities for activity types

- Advertising:
 - Banner Ads
 - Billboard
 - 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
 - Shop around
- Press and Analyst Relations:
 - Article
 - Briefing
 - Community Relations
 - Company Magazine
 - Crisis Communications
 - Internal Communications
 - Investor Relations
 - Lobbying

- Press Conference
- Publications
- Release
- Tour

3.17.3 Setting Up an Activity

Use the following procedure to create an activity:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Activity.
3. Create a Activity Name.
4. Select an Activity Type.
5. Mark Active. Only Active Activities are available within the application.
6. Associate Marketing Medium.
 - a. Select a Marketing Medium from the list of active Marketing Mediums displayed.
 - b. Select Active From and Active To dates. These dates should fall within the Active From and Active To dates of the Marketing Medium.
 - c. 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.
8. Save your work.

3.18 Setting Up User Statuses

System statuses drive certain behaviors of Marketing objects. User statuses, on the other hand, can be created on top of system statuses. User statuses do not drive behavior, but can be used for the purpose of classification. By setting a User Status, you can configure the values of the object's "status" field. This improves usability and analysis of objects within the application.

For example, a Campaign can have a system status - cancelled. The seeded user status for Campaign with a cancelled status is cancelled. This means that when a Campaign's status moves to cancelled, the UI's status field reflects the value "cancelled".

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

To understand and set up User Status see the following sections:

- [Section 3.18.1, "Seeded User Statuses"](#)
- [Section 3.18.2, "Creating User Statuses"](#)

3.18.1 Seeded User Statuses

All enabled user statuses are 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 loses its default flag. There cannot be two default user statuses for given combination of activity and status.

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

3.18.2 Creating User Statuses

Multiple Users Statuses may be created and enabled for a particular System Status. All functionality and rules associated with the system status will be applicable for the user status created for that combination.

Use the following procedure to create user statuses:

Prerequisites

None

Steps

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.

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.

- 6. Save your work.

3.19 Setting Up Mandatory Rules

In Oracle Marketing, most objects can use Mandatory Rules. These rules enable a company to control data entry by mandating that certain fields be entered on specific screens. In other words, rules can be created to make certain data fields mandatory. Certain values in the selected columns are seeded and cannot be changed/modified.

For example, when creating a Campaign, on the Campaign Details page, Purpose is not a mandatory field by default. Seeded, it is an optional field. If your business requirements mandate that users must select a value for this, then you can create a mandatory rule to enforce this business rule.

Table 3–27 *Mandatory Rule Not Enabled for Purpose*



A screenshot of a web form. It features a label 'Purpose' followed by a text input field with a small downward-pointing arrow on its right side, indicating a dropdown menu. The entire form element is enclosed in a thin red rectangular border.

Table 3–28 *Mandatory Rule Enabled for Purpose*



A screenshot of a web form. It features a label '*Purpose' followed by a text input field with a small downward-pointing arrow on its right side, indicating a dropdown menu. The asterisk indicates that this field is mandatory. The entire form element is enclosed in a thin red rectangular border.

To create mandatory rules (for the example shown above), follow the procedure below:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Mandatory Rules.
3. The Mandatory Rules Details page opens.
4. In the Parent Object Type drop-down menu select Campaign.
5. In the Object Attribute drop-down menu select Main (this is the side navigational menu for which this field appears).
6. In the Available fields column, select Purpose. Highlight this field, shuffle it to the Selected Fields column.
7. Select Update to save your work.
8. Navigate to Campaign > Campaigns > (open an existing Campaign).
9. Navigate to Campaign Details page.
10. Purpose is now a mandatory field.

3.20 Setting Up Locking Rules

Locking Rules are a way for companies to control data entry by disallowing updates to certain data at certain statuses. For example, if a marketer is not supposed to be able to update a Campaign's version, this field can be locked for this user. In this case, when the user navigates to the Campaign Details page, version (usually an updatable field) will not be updatable.

By design, locking rules are ignored for the Oracle Marketing Super User responsibility. In other words, when an Oracle Marketing Super User is logged in, the fields which are supposed to be locked are updatable. If the user is not logged in as the Oracle Marketing Super User, then the fields will display according to the locking rules defined.

To create a locking rule (for the example described above), use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.

2. Navigate to Administration > Marketing > Setup > Locking Rule.
The Locking Rules page opens.
3. In the Parent Object Type drop-down menu select Campaign.
4. In the Object Attribute drop-down menu select Main (this is the side navigational menu for which this field appears).
5. In the System Status LOV, choose New.
6. In the Available fields column, select Version. Highlight this field, shuffle it to the Selected Fields column.
7. Select Update to save your work.
8. Navigate to Campaign > Campaigns > (open an existing Campaign).
9. Navigate to Campaign Details page.
10. The Version field is now locked.

3.21 Setting Up Approval Rules

Approvals can be used for all objects created within the Oracle Marketing application. For core Marketing, objects include:

- Campaigns
- Campaign Schedules
- Events
- Event Schedules
- One-Off Events
- Offers
- Deliverables
- Price lists
- Claims

To understand and implement Approval Rules see the following sections:

- [Section 3.21.1, "Overview of Approval Rules"](#)
- [Section 3.21.2, "Understanding the Approval Process"](#)
- [Section 3.21.3, "Setting Up Approvals"](#)

3.21.1 Overview of Approval Rules

The following is a list of terms and concepts for approval rules:

Concept Approval

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

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

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 'Cutoff Percentage' being met. See Profile Option, AMS Cutoff Percentage for Approval.

Budget Request Approval

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'.

3.21.2 Understanding the Approval Process

If the Custom Setup selected for the marketing object requires both theme and Budget approval, the approval process will proceed in the following manner.

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 Cutoff Percentage for Approval, 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.

3.21.3 Setting Up Approvals

Use the following procedure to implement approvals.

- [Section 3.21.3.1, "Setting Up Role Types for Approvals"](#)
- [Section 3.21.3.2, "Setting Up Roles for Approvers"](#)
- [Section 3.21.3.3, "Setting System Profiles for Approvals"](#)
- [Section 3.21.3.4, "Creating Approval Rules"](#)
- [Section 3.21.3.5, "Assigning Approvers"](#)
- [Section 3.21.3.6, "Running Workflow Background Process for Approvals"](#)

3.21.3.1 Setting Up Role Types for Approvals

The required role types for approvals are:

- **Default Marketing Approver:** Approver of any new marketing object requiring approval.
- **Marketing Approver:** Approvers specified by the approval rules.

Use the following procedure to set up role types for approvals:

Prerequisites

None

Steps

1. Log in to Oracle Forms with CRM Administrator responsibility.
2. Navigate to Setup > Role Types.
3. Use Find to check for the role type of AMSAPPR. If the role type does not exist, it must be created.
4. From Menus, select New to create a new line.
5. Under the Code column, enter AMSAPPR.
6. Under Meaning, enter Default Marketing Approver.
7. Under Description, enter Default Marketing Approver.
8. Save the record.
9. If more than one person in the organization will be approving marketing objects, create a role type called Marketing Approver.
10. Use Find to check for the role type of MKTGAPPR.
11. From Menus, select New to create a new line.
12. Under the Code column, enter MKTGAPPR.
13. Under Meaning, enter Marketing Approver.
14. Under Description, enter Marketing Approver.
15. Save the record.

3.21.3.2 Setting Up Roles for Approvers

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

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. The system will not prEvent you from assigning the role to more than one user.

Use the following procedure to set up approver roles:

Prerequisites

None

Steps

1. Log in to Oracle Forms with Oracle Marketing Administrator responsibility.
2. Navigate to Setup > Roles.
3. Query to determine whether the role AMS_DEFAULT_APPROVER exists. If not, create it with the following steps.
4. From Menus, select New to create a new line.
5. Under the Code column, enter AMS_DEFAULT_APPROVER.
6. Under Name Type, enter Default Marketing Approver.
7. Under Type, use the LOV to select Default Marketing Approver or the description you gave the Default Marketing Approver Role Type.
8. Under Description, enter Default Marketing Approver Role.
9. Select the checkboxes Active and Manager.
10. Save your work.
11. Assign this role to a valid user.

3.21.3.3 Setting System Profiles for Approvals

See the table below for system profiles and their values.

Table 3–29 Profiles for Approvals

Option	Required	Level	Setting	Effect/Limitation
AMS : Cutoff Percentage for Approval	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: Cutoff Percentage for Approval 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.

3.21.3.4 Creating Approval Rules

The creation process involves first creating an approval rule and then assigning approvers to the rule.

Use the following procedure to create approval rules:

Prerequisites

None

Steps

1. Navigate to Administration > Marketing > Setups > Approval Rules.

2. Select Create.
3. Enter a Name for the Approval Rule.
4. Select an Approval Rule Type from the following:
5. 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:** 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.

3.21.3.5 Assigning Approvers

Approvers can be assigned by role, 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.

3.21.3.6 Running Workflow Background Process for Approvals

Run the following concurrent program to perform background processes necessary for the approvals implementation to be complete.

Table 3–30 Workflow Background Process for Approvals

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.

3.22 Setting Up Geographic Areas

Geographies are 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. Run the Concurrent Manager Program, **Load Geographic Hierarchies**, any time Geography is modified.

Prerequisites

None

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. Select 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.
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.
 7. Select Update.

3.23 Setting Up Word Replacement Rules

Follow the steps below to add new words to TCA's word replacement system.

Prerequisites

Oracle Accounts Receivable (TCA) is implemented

Steps

1. Log in to Oracle Forms as Oracle Receivables Manager.
2. Navigate to Setup > Word Replacement Rules.
3. Select Form Name Word Replacement (ARXWRDRP.fmb).
4. Add new word replacements.
5. Save your work.

3.24 Setting Up Existence Checking

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 programs use algorithms to create any TCA entity.

To understand and implement existing checking and word replacement rules see the following sections:

- [Section 3.24.1, "Existence Checking Algorithm"](#)
- [Section 3.24.2, "Existence Checking with the Customer Key"](#)
- [Section 3.24.3, "Existence Checking for Address"](#)
- [Section 3.24.4, "Existence Checking for Contacts"](#)
- [Section 3.24.5, "Existence Checking for Contact Points"](#)

3.24.1 Existence Checking Algorithm

If Location does not exist then create a Location. If Party does not exist then create a Party. If Part Site does not exist for the combination of above Party and Location then create a Party Site. If a Contact Party does not exist then create a Contact party. If a Relationship of type CONTACT does not exist between Party and Contact Party then create Org Contact, Relationship and Contact Roles. If Contact Points do not exist then create Contact Points.

3.24.2 Existence Checking with the Customer Key

Existence checking is done using customer_key in HZ_PARTIES. This key is generated by TCA APIs while creating the customer. List Import program populates 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 the 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.

Existence checking for a B2B customer is based on Name, Address1 and Country columns. First, the algorithm locates the highest Party ID for the provided Name, Address1 and Country columns. If that fails, it looks for the highest Party ID for the same Name within the Country. If this also fails then it takes the name with the highest Party ID.

3.24.3 Existence Checking for 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.

To check for Address existence, the algorithm uses the Address1, City, Zip Code and Country columns.

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.

3.24.4 Existence Checking for Contacts

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.

For Contacts, existence checking first compares the First Name, Last Name, Email Address, and Telephone area code, number and extension fields. It first checks Name along with both Email Address and Telephone information. If this fails then it checks the Name and Email Address and if this also fails, then checks Name and Telephone information.

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 exist and attach the list to that contact.

3.24.5 Existence Checking for Contact Points

List import creates Phone, Email, and WEB information. For Phone, existence checking is based on Name, Phone Country Code, Area Code, Phone Number and Extension. For Email, existence checking is based on Name and Email Address.

3.25 Setting Up Data Sources

Data Sources are setups for importing data from a variety of sources, including TCA. Users may also define their own data sources, both master and sub type.

To understand and implement Data Sources see the following sections:

- [Section 3.25.0.1, "Seeded Data Sources"](#)
- [Section 3.25.0.2, "Creating a Data Source"](#)

3.25.0.1 Seeded Data Sources

Oracle Marketing seeds two master data sources for B2C and B2B: Person_List and Organization_contact_list.

Seeded values for Person_list:

- Person_phone1
- Person_phone2
- Person_phone3
- Person_phone4
- Person_phone5
- Person_phone6
- Person_account_list
- Fax

Seeded values for organization_contact_list:

- Organization_phone1
- Organization_phone2

- Organization_phone3
- Organization_phone4
- Organization_phone5
- Organization_phone6
- Organization_list
- Organization_account_list
- Fax

3.25.0.2 Creating a Data Source

Use the following procedure to create a data source.

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.

3.26 Setting Up Marketing Source Codes

Source codes are unique identifiers for the following marketing objects:

- Campaigns
- Campaign Schedules
- Events
- Event Schedules
- Offers

Source codes play an important role in marketing because the customer, most often, interacts with the application using a source code. Source codes are stored with orders to track the effectiveness of an Event, Campaign or Offer.

To understand and implement Marketing Source Codes see the following sections:

- [Section 3.26.1, "Source Code Construction"](#)
- [Section 3.26.2, "Source Code Schema"](#)

3.26.1 Source Code Construction

Source codes are constructed using various components. The maximum number of characters in a source code is 30. The Geography Code comes from the geographic area code entered in Geography. The Suffix comes from the source code suffix field in Custom Setups. The source code may contain any of the following components:

- Geography Code
- Month Code
- Activity Code
- Source Code digits (maximum number equals 30 - total of other components)
- Suffix

3.26.2 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.

Table 3–31 Source Code Schema Reference

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
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 following table shows definitions for the AMS_SOURCE_CODE table:

Table 3–32 Table Definitions

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)

Table 3–32 Table Definitions

Column Name	Field Type	Description
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)
RELATED_SOURCE_ID	NUMBER	FK to the marketing object to which the related source code points to.

3.27 Setting Up the Marketing Calendar

The Marketing Calendar is a generic calendar available to all marketing users. Different users can have different views of the calendar, however, contents are not personalizable at user level. The calendar displays marketing objects based on statuses and time range. Procedures need to be performed to centrally setup what objects are shown in the calendar.

Marketing Objects supported by the Marketing Calendar:

- Campaign Schedules
- Event Schedules
- One-Off Events
- Offers

To implement the Marketing Calendar use the following procedure:

- [Section 3.27.0.1, "Assigning Usage to Resource Group"](#)
- [Section 3.27.0.2, "Selecting Calendar Display Parameters"](#)
- [Section 3.27.0.3, "Running Concurrent Program for Calendar"](#)
- [Section 3.27.0.4, "Configuring User Profiles"](#)

3.27.0.1 Assigning Usage to Resource Group

Before users can view the Marketing Calendar, their group must be assigned the CRM Foundation Calendar Items Group Usage. Only users on groups with “Calendar Item” usage will be able to view Marketing Objects. For more information see the *Oracle Marketing User’s Guide*.

To assign usage to a resource group follow the procedures below:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Resources > Groups Summary.
3. Select a Group.
4. Select Group Lookup.
5. Fill in the following mandatory fields for Group Details:
 - Group Name: Name of the group by which Calendar usage privileges are requested.
 - Start Date: Start date for which the group will be able to access the Marketing Calendar.
6. Fill in the following mandatory fields for Group Usages:
 - Usage: To enable Calendar functionality, select CRM Foundation Calendar Items from the drop-down menu.
7. Select Update to save changes.

3.27.0.2 Selecting Calendar Display Parameters

The Marketing Administrator must decide on the parameters that will ultimately be displayed in the Marketing Calendar. The Administrator has 2 options:

- **Criteria:** Displays Marketing Objects based on a criteria for which they qualify. For example, an Event Schedule may have a criteria of Status “new” and Date “January 1, 2003 - March 1, 2003”.
- **Object:** Displays Marketing Objects specified. The Marketing Calendar supports Campaign Schedule, Event Schedule, One-off Events, and Offers.

To specify Calendar parameters follow the procedure below:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Calendar Criteria.
The Calendar Criteria page open.
3. Select Create.
The Create Marketing Calendar Criteria page opens.
4. Fill in the following details:
 - **Object:** Marketing Object that will be displayed on the Calendar.
 - **Custom Setup:** Select a custom setup for the Marketing Object selected.
 - **Start Date:** Start date by which the Marketing Object selected will begin appearing on the Calendar.
 - **End Date:** End date for which the Marketing Object selected will stop appearing on the Calendar.
 - **Priority:** Priority level by which the Marketing Object will appear in the Calendar.
 - **Status:** Marketing Object Status. For example, if the Marketing Object selected for display is "Campaign Schedule", the status chosen may be Active Schedules. In this case, only Active Campaign Schedules will appear on the Marketing Calendar.
5. Select Update to save your work.

3.27.0.3 Running Concurrent Program for Calendar

Before the new object or criteria will display on the Marketing Calendar, run the concurrent program **AMS : Interface Marketing Objects to Calendar**. This program is a workflow background process and will update the Calendar as needed.

3.27.0.4 Configuring User Profiles

Before a user can view the Marketing Calendar they must specify in their user profile what marketing objects they want to view. Further, users can personalize the Calendar by saving preferences based on their needs.

To configure user profiles for Calendar preferences follow the procedure below:

1. Log in to Oracle Marketing.
2. Select the Profile icon.
3. Navigate to Calendar > Personalize.

The Calendar Personal Preferences Page opens.

4. In the Display Items drop-down menu choose **Yes**. The default value for this drop-down menu is No. This profile turns on the Calendar feature.
5. Select Update to save your work.

3.28 Setting Up Click-Through-Destinations

Click-Through-Destinations (CTD) allows marketers to generate URLs in the application. This functionality enables a marketer to create a URL for content, while hiding the complexity of the URL. This simplifies the process of creating a URL because the marketer does not have to know all URL parameters.

To understand and implement Click-Through-Destinations see the following sections:

- [Section 3.28.1, "Creating URLs for Click-Through-Destinations"](#)
- [Section 3.28.2, "Tracking Click-Through-Destinations"](#)
- [Section 3.28.3, "Understanding Click-Through Actions"](#)
- [Section 3.28.4, "Implementing Click-Through-Destinations"](#)
- [Section 3.28.5, "Logical Process of Creating Click-Through-Destinations"](#)
- [Section 3.28.6, "Creating Click-Through-Destinations in the Application"](#)
- [Section 3.28.7, "Troubleshooting a Click-Through-Destination Implementation"](#)

3.28.1 Creating URLs for Click-Through-Destinations

There are already 3 ways of creating CTD URLs:

- **Email Content:** A CTD can be created for a Campaign Schedule of type “direct marketing - email”. In this example, the CTD action is “Go To Web Script”. After selecting this action, the user selects the associated Event (in the example, Event registration). Once the e-mail Campaign Schedule becomes active, a targeted e-mail is sent to a group of customers and or prospects. When the targeted group receives the e-mail and clicks the embedded e-mail link he or she is redirected to a web page for Event registration.
- **Web Advertisement Content:** For example, a web advertisement can be placed on the homepage of a web store using merchandising functionality. In this case, a Campaign Schedule of type “Web Marketing - Advertisement” is used, and the associated click-through destination content is an image displayed on the homepage of the web store. When a user visits the homepage of the web store they will see the image, if they choose to click on the image, they will automatically be routed to the specified destination page.
- **Web Offer:** For example, a Web Offer can be placed on the homepage of a web store using eMerchandising functionality. This Offer can be associated with an image containing the CTD. The associated could be “Go to iStore Shopping Cart with an Item”. Ultimately, the user visits the homepage of the web store, clicks the image and is routed to the shopping cart page of the web storefront. The Offer is applied at line level to the shopping cart total.

3.28.2 Tracking Click-Through-Destinations

Tracking CTDs enables businesses to gain key intelligence about customer behavior. For example, tracking enables marketers to know who responded to the Campaign Schedule (Internet Advertisement or e-mail) that the CTD is part of. Tracked customer and prospect information is stored in Interaction History. Later, it can easily be used for reporting, targeting, and intelligence purposes. To implement tracking for CTDs see [Section 3.28.4.5, "Enabling Click-Through Destination Tracking"](#).

3.28.3 Understanding Click-Through Actions

When creating a CTD you will select a specific “action” for it. For example, if creating a CTD for web advertisement, the “action” for the click-through could be to “send the targeted user to a specific URL”.

The following actions are seeded with the product:

- **Go to URL:** Sends the user to the defined URL. The URL for this action must be preceded by HTTP:// or HTTPS://.
- **Go to iStore shopping cart:** Uses iStore deep linking functionality to directly forward the user to the shopping cart page. This action is available only if iStore is implemented.
- **Go to Product Details page in iStore:** Uses deep linking to directly forward the user to a specific iStore product detail page. When using this functionality, AMS : Item Validation Organization setting must match the IBE : Item Validation Organization setting. These profiles must be set to the same Master Inventory Organization. If they do not match, Products in iStore are not visible in Oracle Marketing. This action is available only if iStore is implemented.
- **Go to Shopping Cart with Item:** Uses deep linking to directly forward the user to the iStore shopping cart page. The shopping cart can contain an item that has previously been added. This action is available only if iStore is implemented.
- **Go to Section iStore:** Uses deep linking to directly forward the user to a specific section within the iStore page hierarchy. This action is available only if iStore is implemented.
- **Go to iStore Registration Page:** Uses deep linking to forward the user to the iStore registration page. This action is available only if iStore is implemented. If using this action when creating an e-mail CTD be sure to set the profile IBE : Default Specialty Store to the name of the store that you are directing the user to.
- **Go to Catalog/Minisite in iStore:** Uses deep linking to route user to the homepage of a specific specialty store. The homepage for the user will vary on the preferences selected by that user. For example, if the user hasn't registered in the store, and has the responsibility of IBE_GUEST, the user will be forwarded to the generic homepage. However, if the user has previously registered, and has the responsibility of IBE_CUSTOMER with a saved preference of "English", the user will be forwarded to the English humped for that storefront. This action is available only if iStore is implemented.
- **Go to a Web Script:** Displays a list of available web script actions. This list will not display all web scripts deployed, rather, will display all web scripts associated through the contact point of the Campaign Schedule. For example, you can create a web script for online Event registration. In this example, a Campaign Schedule of type "e-mail" must exist -- it must have a contact point of type "inbound script". The contact point type must be associated with the

Event registration web script (used as the CTD). Given this setup, the user receives an e-mail, clicks the hyperlink, and is re-directed to the script for online registration. For more information about implementing Oracle Scripting with Oracle Marketing see [Section 3.29, "Implementing Oracle Scripting"](#)

3.28.4 Implementing Click-Through-Destinations

The following procedures must be performed to implement CTD:

- [Section 3.28.4.1, "Setting the Server URL"](#)
- [Section 3.28.4.2, "Enabling Encryption for Click-Through-Destinations"](#)
- [Section 3.28.4.3, "Setting Up Default Specialty Store"](#)
- [Section 3.28.4.4, "Setting the Master Inventory Organization"](#)
- [Section 3.28.4.5, "Enabling Click-Through Destination Tracking"](#)

3.28.4.1 Setting the Server URL

To enable the application to use complete URLs for tracking JSPs, set **AMS : Server URL** at **site level**. This is the URL where the application is running. This is set to `http://host server name:port number`.

3.28.4.2 Enabling Encryption for Click-Through-Destinations

Because the `party_id` is exposed in a URL, Oracle Marketing supports encryption for URLs. To implement this functionality use the following procedure:

- Set `JTF_FM_LENCRYPT_DELIM` to an appropriate delimiter from the list provided.
- Set `JTF_FM_RENCRYPT_DELIM` to an appropriate delimiter from the list provided.
- For `JTF_FM_SECURITY_KEY` leave to `changeme`.

Once the values for these profiles have been set you should not change them.

3.28.4.3 Setting Up Default Specialty Store

If using this action when creating an e-mail CTD be sure to set the profile **IBE : Default Specialty Store** to the name of the store that you are directing the user to.

3.28.4.4 Setting the Master Inventory Organization

If using the CTD action “Go to Product Details Page in iStore” then the following profiles must match:

- AMS : Item Validation Organization
- IBE : Item Validation Organization

If Oracle Marketing and Oracle iStore Products are not pointing to the same Master Inventory Organization then the action “Go to Product Details page in iStore” will not function properly. Therefore, set the profiles listed above to the same Master Inventory Organization.

For example:

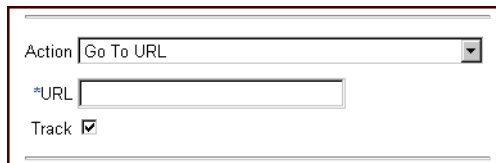
- AMS : Item Validation Organization = Vision Operations USA
- IBE : Item Validation Organization = Vision Operations USA

3.28.4.5 Enabling Click-Through Destination Tracking

To enable the tracking functionality set **AMS : Interaction Logging Enabled** at site level. Tracking is an optional setup.

- If set to **Yes**: A checkbox is displayed in the Click-Through-Destination screen tracking is available in the application. This features enables each click-through to be logged in the JTF Interaction History Tables. The logging trail tracks Party-id, Campaign Schedule source code, time, and date of the click-through.
- If set to **No**: The tracking checkbox is not visible in the click-through-destination screen. If set to No, each click-through is not logged in the JTF Interaction History Tables.

Figure 3–8 Tracking Profile Enabled



The screenshot shows a web form with the following elements:

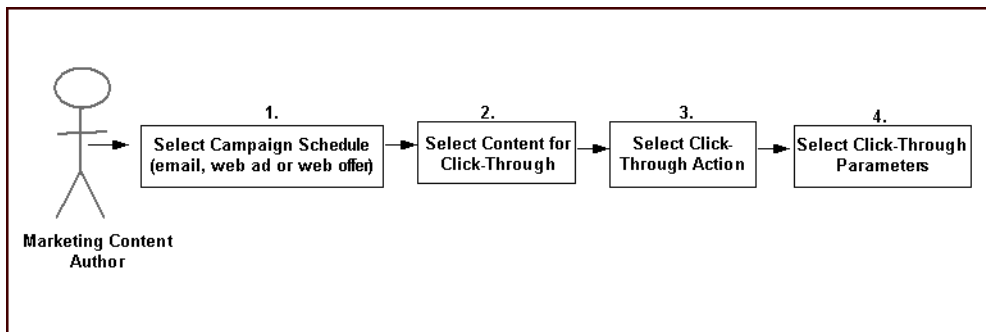
- An "Action" dropdown menu with "Go To URL" selected.
- A text input field labeled "*URL".
- A "Track" checkbox that is checked, indicated by a small square icon.

3.28.5 Logical Process of Creating Click-Through-Destinations

A marketing uses the following logical process when creating CTDs:

1. **Select Campaign Schedule:** Campaign Schedules can be of type e-mail, web advertisement or web Offer. For more information see the following sections:
2. **Select Content Type.** Content type must be selected either by using the Content cue card for Web ads and Offers or by using an email authoring tool.
3. **Select Click-Through Action:** For a specific content type, select a specific action.
4. **Select Click-Through Parameters:** Based on the action selected, a parameter automatically becomes available. For example, if the action selected is “go to URL”, the available parameter will automatically be populated. In this example, the parameter is a textbox for the marketer to input a destination URL.

Figure 3–9 Logical Process of Creating Click-Through Destinations



3.28.6 Creating Click-Through-Destinations in the Application

After CTDs are implemented a marketer can create them up in the application. A marketer can several types of CTDs:

- [Section 3.28.6.1, "Creating Email Click-Through-Destinations"](#)
- [Section 3.28.6.2, "Creating Web Advertisement Click-Through-Destinations"](#)
- [Section 3.28.6.3, "Creating Web Offers Click-Through-Destinations"](#)

3.28.6.1 Creating Email Click-Through-Destinations

To create a CTD for e-mail content use the following procedure:

Prerequisite

- AMS : Enable Fulfillment is set to Yes
- Templates are implemented, for more information see [Section 3.6, "Setting Up Fulfillment"](#)
- Queries are implemented, for more information see [Section 3.6.5, "Setting Up Fulfillment Queries"](#)
- A Campaign using e-mail for fulfillment is created

Steps

1. Navigate to Campaigns > Execution > Campaign Schedule.
The Campaign Schedule details page opens.
2. Select Create.
3. In the Setup Type LOV select Direct Marketing - Email.
This selection will cause the application to automatically populate the Activity Type to Direct Marketing and the Activity to Email.
4. Enter the following mandatory fields:
 - **Name:** Give the Campaign Schedule an appropriate name.
 - **Language:** Select a default language for the Campaign Schedule.
 - **Coordinator:** Select a default coordinator for the Campaign Schedule.
 - **Currency:** Select a default currency for the Campaign Schedule.
 - **Start Date:** Select a default start date for the Campaign Schedule.
 - **Time Zone:** Select a default time zone for the Campaign Schedule.
5. In the Mail Preferences section enter a subject for the e-mail.
6. Select Update.
Once Update is selected a pencil icon appears.
7. In the Mail Preferences section select the pencil icon.
The Campaign Schedule Details - Email Content page opens.
8. Scroll down to the content creation area.

Note: When using Internet Explorer (IE) the e-mail content creation box will contain iFrame functionality (and thus will contain user friendly text edit features). However, when using Netscape Navigator iFrame functionality is not available. Because of this, we recommend using IE.

9. In the Query field, click the flashlight icon.

The Query selector will launch, this selector enables you to choose a Query.

10. Select a Query type for the e-mail content. This step is mandatory.

Note: Selecting a Query is Mandatory. If you do not select a query you will not be able to create the CTD.

By default Oracle Marketing ships with 2 seeded Queries:

- **Marketing Simple Query:** For a given e-mail template, this contains simple query parameters for an e-mail.
- **Marketing Detailed Query:** For a given e-mail template, in addition to the Marketing Simple Query parameters, additional query parameters are included.

A custom query can also be created. A marketer can define their own query parameters. If creating a custom query for an e-mail CTD, the query must contain the **customer_id** and **source_code** (schedule source code) fields.

- For more information about templates and fulfillment see [Section 3.6, "Setting Up Fulfillment"](#).
- For more information about creating custom queries see [Section 3.6.5, "Setting Up Fulfillment Queries"](#).

11. Create the e-mail content using the content creation box:

- **If using Internet Explorer:** The content creation area is an iFrame textbox. Highlight the text (to be used in the link) and select the hyperlink icon. The Campaign Schedule Details - Click Through Destination page opens. Using this page, select an action and related parameters. Select Apply to save your work.

- **If using Netscape:** The content creation area is a simple text editing box, not an iFrame textbox. Below the textbox, select “Define Click-Through URL”. The Campaign Schedule Details - Click Through Destination page opens. Using this page, select an action and related parameters. After applying changes, within the textbox, replace the text “Use Proper Anchor Text” to a user friendly description. For example, replace it with “Click Here” (see below).

Figure 3–10 Netscape Text Replacement

Content

☐ Text ☒ HTML

*Query

12. Select Update to save your work.

If you modify a Query after you are finished with the CTD, the CTD will need to be re-created.

3.28.6.2 Creating Web Advertisement Click-Through-Destinations

To create a CTD for web advertisements follow the procedure below:

Prerequisite

A Campaign using web advertisements has been created

Steps

1. Navigate to Campaigns > Execution > Campaign Schedule.
2. The Campaign Schedule details page opens.
3. Select Create.
4. In the Setup Type LOV select Internet Advertisement.

This selection will cause the application to automatically populate the Activity Type to Web Marketing and the Activity to Advertising.

5. Select Create to save your work.
6. Navigate to Execution > Content (for the Campaign Schedule defined above).
7. Select Create.

The Create Content page opens.

8. In the Type drop-down choose one of the following:
 - **Web Image:** Displays an image to the user. The user clicks the image and is routed to the destination page defined.
 - **Web Text:** Display text to the user. The user click the text and is routed to the destination page defined.
9. In the Subtype drop-down choose a subtype for the selected Type.
10. In the File textbox, click the flashlight icon.

The file selector navigation window opens. Using this navigator, search and select a stored image. If using an image that has not been uploaded, select Upload New Image.

11. In the Click-Through-Destination section enter an action for the CTD.
 - Based on the action selected, the application will populate available parameters.
 - For example, if the action “Go to iStore Shopping Cart” is selected, the application will populate, next you will be prompted to select a specialty store.
 - You will not be able to preview the web advertisement in a web storefront until you are in a runtime environment.
 12. Select Create to save your work.
- A confirmation message appears.
13. Navigate to Campaign > Execution > Content.
 14. Select the image or text (select the image or text previously selected).
 15. Select Preview.

A Preview window opens displaying either the image or text selected for the web advertisement.

3.28.6.3 Creating Web Offers Click-Through-Destinations

For Web Offers, action “Go to Web Script” is not available. The reason being is that generally you would not create a web Offer containing a scripted flow of actions.

Use the following procedure to create a CTD for Web Offers:

Prerequisite

- The Web Offer is Request only
- The Web Offer has a discount level of “line”
- The profile AMS : Item Validation Organization and IBE : Item Validation Organization are set to the same Master Inventory Organizations

Steps

1. Navigate to Campaigns > Offer > Execution > Content.
The Offer Details - Content page opens.
2. Select Create.
The Create Content page opens.
3. In the Type drop-down choose one of the following:
 - **Web Image:** Displays an image to the user. The user clicks the image and is routed to the destination page defined.
 - **Web Text:** Display text to the user. The user click the text and is routed to the destination page defined.
4. In the Subtype drop-down choose a subtype for the Type chosen in step 8. For example, if Web Image was selected, the subtype could be full banner or half banner.
5. In the Description textbox, enter a short description for the content.
6. In the File textbox, click the flashlight icon.
The file selector navigation window opens. Using this navigator, you can search and select a stored image. If using an image that has not previously been uploaded, select Upload New Image.
7. In the Click-Through Destination section select the action “Go to Shopping Cart page in iStore with an item”.

The application will populate, as a result, enter the following mandatory fields:

- **Specialty Store:** Use the flashlight icon to launch the “Choose a minisite” navigator. In the Minisite Column, choose the appropriate minisite. This is the web storefront that is displaying the Web Offer to the user.
 - **Section:** Use the flashlight icon to launch the “Section Selector” navigator. In the section name column, choose the appropriate section. This is the section within the web storefront that contains the item.
 - **Product/Item:** Use the flashlight icon to launch the “Product Selector” navigator. In the product name column select the appropriate column. This is the product within the section that is the destination for the Web Offer.
8. Select Create to save your work.
A confirmation message appears.
 9. Navigate to Campaign > Execution > Content.
 10. Select the content created in step 3.
The Content Details page opens.
 11. Select Preview.
A Preview window opens displaying either the web image or web text selected for the Web Offer.

3.28.7 Troubleshooting a Click-Through-Destination Implementation

Use the following frequently asked question to assist you when troubleshooting a CTD implementation.

1. **Question:** What if the Scripting LOV does not bring any Scripts for ‘Go To Web Script’ Action?

Answer: Double-check that you have associated Scripts to the Campaign Schedule by creating contact point of type ‘Inbound Script’. When using the action “Go to Web Script”, you must associate the script to the Campaign schedule by creating a the contact point listed above.

2. **Question:** When I click on an e-mail “Click Three Link” nothing happens, what am I doing wrong?

Answer: Verify that your merge fields in the Click-Through- Destination links are not set up incorrectly. If you have changed the query after creating the CTD, this could be causing the error. If you’ve changed query parameters, you will need to re-create the CTD. If you don’t see customer_id and source_code

(shown below) in your URL as merge fields that means you need to re-create the CTD.

- `http://ap045sun.us.oracle.com/OA_HTML/amstracking.jsp?wcid=13891&t=Y&amsp=<<customer_id>>&scdd={{source_code}}`

3. **Question:** When I click on a Click Through Link nothing happens, why?

Answer: Make sure you have not changed these profile values:

- JTF_FM_LENCRYPT_DELIM,
- JTF_FM_RENCRYPT_DELIM and JTF_FM_SECURITY_KEY

4. **Question:** The Tracking checkbox “Tracking cannot be performed” is not visible in the UI, why?

Answer: Validate that the profile AMS : Interaction Logging Enabled is set to Yes.

5. **Question:** When I select an existing Click Through hyperlink in Email Content and press the Web Button in iFrame, I see a javascript prompt instead of the Click Through Destination Definition Page, why?

Answer: Existing Click-Through-Destination in Email Content (iFrame) cannot be updated.

6. **Question:** When I try to select a product under a section, I cannot see any Products, yet, I can see them in iStore, why?

Answer: Check with your iStore Administrator. The Products can be in a sub-section under the section you are trying to select. Also, validate that the following profiles are pointing to the same Inventory Organization:

- AMS : Item Validation Organization
- IBE : Item Validation Organization

7. **Question:** I cannot see all the Minisites after I have selected a Section/Product combination, why?

Answer: The Minisites LOV will show all the Minisites containing the Section and Product combination you have selected. If you want to see all the minisites, deselect the Section/Section and Product you have selected.

8. **Question:** I cannot see all the Sections after I have selected a Product, why?

Answer: The Sections LOV will show all the Sections containing the Product you have selected. If you want to see all the sections, deselect the Product you have selected.

9. Question: My URL parameters are not being encrypted, why?

Answer: Verify the following profiles:

- JTF_FM_LENCRIPT_DELIM - must be set to an appropriate delimiter from the list provided.
- JTF_FM_RENCRIPT_DELIM - must be set to an appropriate delimiter from the list provided.
- JTF_FM_SECURITY_KEY - must be set to changeme.

10. Question: I cannot see an Event on Events LOV, even though the Event is Active, why?

Answer: Check the Registration End Date of the Event. The Event LOV shows only those Events which have the Registration End Data later or equal to the current date.

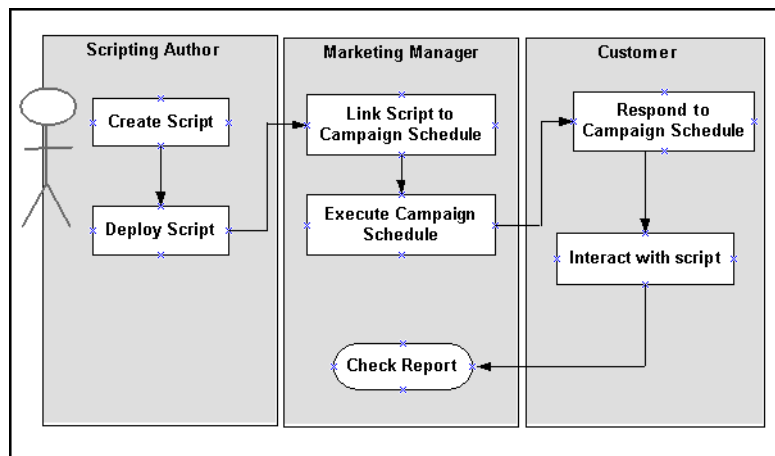
3.29 Implementing Oracle Scripting

Using the Scripting branching functionality marketing organizations can react differently to customer input based on a customer profile. Branching enables flow control logic for scripts allowing questions to be scripted based on the customer profile. Ultimately, this improves personalization and customer relationships. To understand and implement Scripting for marketing purposes see the following sections:

- [Section 3.29.1, "Logical Process of Creating Scripts"](#)
- [Section 3.29.2, "Setting Up Oracle Marketing for Scripting"](#)
- [Section 3.29.3, "Implementing Seeded Scripts"](#)
- [Section 3.29.4, "Implementing Scripting and Survey Reports"](#)
- [Section 3.29.5, "Troubleshooting a Scripting Implementation"](#)

3.29.1 Logical Process of Creating Scripts

See the diagram below for a logical representation for creating Scripts.

Table 3–33 Creating Scripts - Logical Sequence

3.29.2 Setting Up Oracle Marketing for Scripting

To set up Oracle Scripting for marketing purposes use the following procedures:

- [Section 3.29.2.1, "Deploying Scripts into the Database"](#)
- [Section 3.29.2.2, "Creating a Survey Deployment"](#)
- [Section 3.29.2.3, "Verifying Contact Points of a Campaign Schedule"](#)
- [Section 3.29.2.4, "Attaching Deployed Survey or Script to a Campaign Schedule"](#)

3.29.2.1 Deploying Scripts into the Database

All scripts need to be deployed into the database before they can be used. If adding a new script or modifying an existing script, database deployment is again required.

To deploy a script into the database (in any environment) use the following procedures:

Prerequisites

None

Steps

1. FTP the script from \$AMS_TOP/scripts directory to your local machine.
2. Launch the Script Author Applet from Scripting Administration Console.

- For more information on the Script Author Applet refer to the following Metalink note: *Oracle Scripting (IES) Interaction Center Family Pack P Readme*.

1. Log into jtflogin.jsp as a user with Scripting Administrator responsibility.
2. Select Launch Script Author.
This starts the Script Author applet.
3. In Script Author, open a script (open one at a time).
4. From the Tools Menu, select Deploy Script.
This will deploy the script into the database.
5. Repeat this process for deploying additional (or modified) scripts into the database.

3.29.2.2 Creating a Survey Deployment

After deploying the scripts into the database, a Survey deployment must be created. Survey deployments are integrated with the Campaign Schedule in the Click-Through-Destination(CTD) Module of Oracle Marketing.

Use the following sequence when creating a survey deployment:

1. Using Oracle Scripting - create a Survey Campaign.
2. Using Oracle Scripting - create a cycle for the Campaign.
3. Using Oracle Scripting - create a Survey deployment.
4. Using Oracle Marketing - attach deployed survey to its appropriate CTD.

In order to create a Survey Campaign a “survey resource” must be associated with it. Survey resources are HTML files or file fragments, displayed to users of the survey at runtime. Resources are displayed in each HTML file as a:

- Header page
- Footer page
- Error page
- Final page

Although the resource might not contain dynamic content, it must be saved in Java Server Page (JSP) format. However, survey resources, like any other HTML or JSP page, may include images and hyperlinks.

The following JSP survey resources are seeded with the product:

- `amsScriptHeader.jsp` - used to create the header resource
- `amsScriptError.jsp` - used to create error resource
- `amsScriptFooter.jsp` - used to create footer resource
- `amsScriptThankyou.jsp` - used to create a final page resource

If launching a web script from Oracle iStore, generally the last page of the script will be the “thank you” page (`amsScriptThankyou.jsp`). In this case, we recommend inserting a link that directs users back to a designated iStore page.

For additional details see the *Oracle Marketing Scripting Implementation Guide*.

3.29.2.3 Verifying Contact Points of a Campaign Schedule

A deployed script is attached to a Campaign Schedule through the inbound or outbound Contact Point. Therefore, you must perform or verify this before the script will function properly.

Figure 3–11 Contact Point Verification

UpdateRestore

Remove	Type	Name
☐	Inbound Script	Customer Authentication Block
☐	Inbound Script	B2C Lead Creation
☐	Inbound Script	B2B Event Registration
☐	Inbound Script	Data Acquisition
☐	Inbound Script	Lead Creation with Customer Authentication
☐	Inbound Script	B2B Lead Creation
☐	Outbound Script	Event Registration with Customer Authentication
☐	Outbound Script	B2C Event Registration

3.29.2.4 Attaching Deployed Survey or Script to a Campaign Schedule

Deployed scripts are attached to a Campaign Schedule using the Campaign Schedule’s inbound or outbound Contact Points. The contact points are added under the Collaboration Cue Card. To verify (or add) scripts to a contact point see [Section 3.29.2.3, "Verifying Contact Points of a Campaign Schedule"](#).

To attach a deployed survey to an existing Campaign Schedule use the following procedure:

Prerequisites

- Scripts are attached to the Contact Point of the Campaign Schedule
- Survey Deployment is created

Steps

1. Log in to Oracle Marketing.
2. Navigate to the Campaign Schedule's Click-Through-Destination Page.
3. Pick the action "Go to Web Script" in the corresponding Click-Through-Destination Page.
4. Select a web script from the Web Script LOV.
This LOV contains only those survey deployments created for the scripts attached to the Campaign Schedule's contact point. For more information see [Section 3.28.3, "Understanding Click-Through Actions"](#).
5. Select Update to save your work.

3.29.3 Implementing Seeded Scripts

Oracle Scripting contains seeded scripts focused on various marketing activities. These scripts can be used with minimum configuration and can be deployed as call-center scripts or web surveys. In addition to simplifying processes, scripts can help ensure communication consistency.

Scripting Marketing Activities:

- **Event Registration:** Enables online self service registration for Marketing Events.
- **Lead Creation:** Captures information from customers/prospects and creates leads based on this information.
- **Data Acquisition:** For existing customers, this script enables the Marketing application to capture additional information to further enhance the customer profile.

Seeded Scripts:

- `amscauth.scr` - Customer Authentication (building block)
- `amserb2b.scr` - B2B Event registration
- `amserb2c.scr` - B2C Event registration

- amserwca.scr - Event registration with customer authentication
- amsldb2c.scr - B2C Lead creation
- amsldb2b.scr - B2B Lead creation
- amsldwca.scr – Lead creation with customer authentication
- amsdatacq.scr - Data acquisition

To implement seeded scripts see the following:

- [Section 3.29.3.1, "Seeded Script: Customer Authentication Building Block"](#)
- [Section 3.29.3.2, "Seeded Script: Event Registration"](#)
- [Section 3.29.3.3, "Seeded Script: Lead Creation"](#)
- [Section 3.29.3.4, "Seeded Script: Customer Data Acquisition"](#)

3.29.3.1 Seeded Script: Customer Authentication Building Block

This seeded script is a building block because it is used with the other scripts to provide core functionality. If you are creating new scripts, the building block script may need to be included.

The Customer Authentication Building Block script provides the following functionality:

- Allows the end user to login using their userid and password.
- Allows the end user to resets their password - sends the re-set password to the user through e-mail.
- Allows users to create a Individual or Business user.

3.29.3.2 Seeded Script: Event Registration

The Event registration script provides a scripted flow of interactions for customer self-service online registration. This script is used for registering for marketing Events. For example, the Marketing Event “Oracle Open World” requires participants to register online. The registration text (questions that users fill out online) are part of a seeded script. This script supports registration to free Events only.

Three seeded scripts are shipped for Event Registration:

- amserb2b.scr - B2B Event registration
- amserb2c.scr - B2C Event registration

- amserwca.scr - Event registration with customer authentication

To implement Event Registration Scripts use the following procedure:

Prerequisites

- A registrable Event is available.
- Scripts are deployed. For more information see [Section 3.29.2.1, "Deploying Scripts into the Database"](#).
- Survey is deployed. For more information see [Section 3.29.2.2, "Creating a Survey Deployment"](#).
- Script and Survey is attached to a Campaign Schedule. For more information see [Section 3.29.2.4, "Attaching Deployed Survey or Script to a Campaign Schedule"](#).
- Oracle 1-to-1 Fulfillment is implemented. For more information see [Section 3.6, "Setting Up Fulfillment"](#).

Steps

1. Log in to Oracle Marketing.
2. Navigate to the Campaign Schedule's Click-Through-Destination Page.
3. Pick the action "Go to Web Script" in the corresponding Click-Through-Destination page.
4. Select a web script from the Web Script LOV.
5. Select an Event from the Event LOV.

This step is required for Event Registration scripts. If you do not select an Event object from the LOV, the Event Registration Script will fail.

6. Save your work.

3.29.3.3 Seeded Script: Lead Creation

The lead integration script captures information about customers. After capturing this information, it is passed to the lead import interface table AS_IMPORT_INTERFACE. When the lead import process is invoked, the lead engine uses this information to qualify, grade, and route the lead.

After the script has ran successfully, the lead import process should be invoked. This ensures that the lead engine uses this information to qualify, grade, and routes the lead.

Once the customer participates in the Lead Creation Survey, the Lead Import Concurrent Program should be started to invoke the lead import process. For more information see the *Oracle Leads Implementation Guide*.

The following scripts are seeded for Lead Creation:

- amsldb2c.scr - B2C Lead creation
- amsldb2b.scr - B2B Lead creation
- amsldwca.scr – Lead creation with customer authentication

To implement a Lead creation script follow the procedure below:

Prerequisites

- Scripts are deployed. For more information see [Section 3.29.2.1, "Deploying Scripts into the Database"](#).
- Survey is deployed. For more information see [Section 3.29.2.2, "Creating a Survey Deployment"](#).
- Script and Survey is attached to a Campaign Schedule. For more information see [Section 3.29.2.4, "Attaching Deployed Survey or Script to a Campaign Schedule"](#).

Steps

1. Log in to Oracle Marketing.
2. Navigate to the Campaign Schedule's Click-Through-Destination Page.
3. Pick the action "Go to Web Script" in the corresponding Click-Through-Destination page.
4. Select a web script from the Web Script LOV.
For the Lead scripts it is not necessary to pick the Event object from the Event LOV.
5. Save your work.

3.29.3.4 Seeded Script: Customer Data Acquisition

This script enhances customer profiles improving segmentation, campaign personalization and customer specific Offers. Optionally, the first step in this script is the customer authentication building block. For more information see [Section 3.29.3.1, "Seeded Script: Customer Authentication Building Block"](#).

The following fields are used to capture customer information in the TCA HZ_PERSON_PROFILES table:

- DATE_OF_BIRTH
- PLACE_OF_BIRTH
- GENDER
- MARITAL_STATUS
- MARITAL_STATUS_EFFECTIVE_DATE
- PERSONAL_INCOME
- HEAD_OF_HOUSEHOLD_FLAG
- HOUSEHOLD_INCOME
- HOUSEHOLD_SIZE
- RENT_OWN_IND

To implement the data acquisition script use the following procedure:

Prerequisites

- Scripts are deployed. For more information see [Section 3.29.2.1, "Deploying Scripts into the Database"](#).
- Deployed Script and Survey are attached to a Campaign Schedule. For more information see [Section 3.29.2.4, "Attaching Deployed Survey or Script to a Campaign Schedule"](#).

Steps

1. Log in to Oracle Marketing.
2. Navigate to the Campaign Schedule's Click-Through-Destination Page.
3. Pick the action "Go to Web Script" in the corresponding Click-Through-Destination page.
4. Select a web script from the Web Script LOV.

For the data acquisition script it is not necessary to pick the Event object from the Event LOV.

5. Save your work.

3.29.4 Implementing Scripting and Survey Reports

The Survey data report is available for those scripts attached as Inbound/Outbound Contact Points of a Campaign Schedule.

The following reports are available:

- Number of people who have started the survey.
- Number of people who have completed the survey.
- Report for questions with pre-defined list of answers.

If the answers are based on a query or API, the last report will not display the data.

To implement scripting and survey reports see the following sections:

- [Section 3.29.4.1, "Understanding Script Dashboard Reports"](#)
- [Section 3.29.4.2, "Setting Up Scripting Reports"](#)
- [Section 3.29.4.3, "Verifying Scripting Reports"](#)

3.29.4.1 Understanding Script Dashboard Reports

A deployed seeded script can be evaluated using a Dashboard Report. These reports are intended for "Marketing Research" types of webscripts. The list of values is pre-defined using Script Author. The list of values must have "Specific Lookup" associated with them. For more information on Specific Lookup, refer to *Oracle Scripting User Guide*.

Reporting is possible for the following lookup types:

- Dropdown
- Radio Button
- Checkbox Group
- Multiselect List

The following questions fall under the required criteria. Therefore, the following questions can be reported on.

Table 3–34 Scripting Reports

Script Name	Question	Description	Question Type
Event Registration with Customer Authentication	1. Select One:	1. From Sign-In Page of Customer Authentication Block	1. Radio Button
	2. Select One:		2. Radio Button
	3. Select One:		3. Radio Button
	4. Event Registration Options:	2. From Sign-In Page of Customer Authentication Block 3. From Sign-In Page of Customer Authentication Block 4. From Event RegistrationPage	4. Radio Button

Table 3–34 Scripting Reports

Script Name	Question	Description	Question Type
Lead Creation with Customer Authentication	1. Select One	1. From Sign-In Page of Customer Authentication Block	1. Radio Button
Data Acquisition	1. Gender 2. Are you the head of your household? 3. Do you rent or own your house? 4. Select one:	1. From Data Acquisition Page 2. From Data AcquisitionPage 3. From Data AcquisitionPage 4. From Sign-In Page of Customer Authentication Block	1. Radio Button 2. Radio Button 3. Radio Button 4. Radio Button
Customer Authentication Block	1. Select One	1. From Sign-In Page of Customer Authentication Block	1. Radio Button

3.29.4.2 Setting Up Scripting Reports

To implement scripting and survey reports follow the procedures below:

Prerequisites

- Scripts are deployed. For more information see [Section 3.29.2.1, "Deploying Scripts into the Database"](#).
- Survey is deployed. For more information see [Section 3.29.2.2, "Creating a Survey Deployment"](#).
- Script and Survey are attached to a Campaign Schedule. For more information see [Section 3.29.2.4, "Attaching Deployed Survey or Script to a Campaign Schedule"](#).
- The survey is executed (customers have participated in the survey)

Steps

1. Run the Concurrent Program Summarize Survey Data.
 - While running this program provide the cycle_id that the script's Survey Deployment belongs to.
 - For more information about this concurrent program see the *iSurvey Implementation Guide*.
 - This program populates data into the relevant tables required by the reports.
2. Save your work.

3.29.4.3 Verifying Scripting Reports

To verify that you have properly implemented the Scripting and Survey reports use the following procedure:

Prerequisites

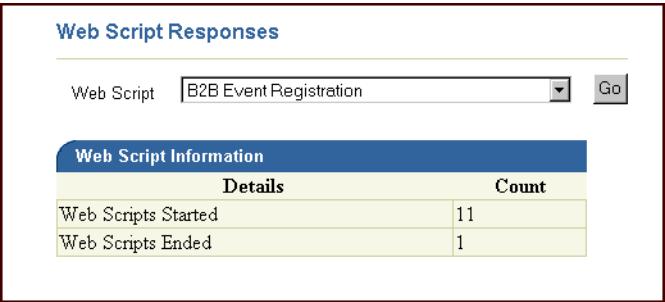
None

Steps

1. Log in to Oracle Marketing.
2. Open a Campaign.
3. Open the Campaign Schedule.
4. Select Optional.
5. Select Dashboard.

The Campaign Schedule Dashboard page opens.
6. If properly implemented, the reports are visible on this page.

Figure 3–12 Script Reports Dashboard



3.29.5 Troubleshooting a Scripting Implementation

Use the following frequently asked questions to help troubleshoot your scripting implementation.

- 1. Question:** I created Survey Deployments for the Scripts. But they are not showing up in the Web Script LOV in Click Through Page of Campaign Schedule. Why?

Answer: Make sure the Scripts of the Survey Deployments are attached to Contact Points of Campaign Schedule.
- 2. Question:** I have run Data Acquisition Survey several times. But the data is not coming up in the Campaign Schedule Dashboard. Why?

Answer: Make sure concurrent program **Summarize Survey Data** is run to see the data in the Dashboard.

Implementing eMerchandising

This chapter includes implementation and administration tasks for the eMerchandising module of Oracle Marketing.

Topics include:

- [Section 4.1, "eMerchandising Overview"](#)
- [Section 4.2, "Implementation Process Overview"](#)
- [Section 4.3, "Implementation Tasks"](#)
- [Section 4.4, "Implementing Mandatory and Optional Dependencies"](#)
- [Section 4.5, "Implementing Web Postings"](#)
- [Section 4.6, "Implementing Web Placement"](#)
- [Section 4.7, "Setting Up the Guest User"](#)
- [Section 4.8, "Implementing Affiliate Placements"](#)
- [Section 4.10, "Setting Up Stylesheets"](#)
- [Section 4.11, "Integrating eMerchandising with Third-Party Web Storefronts"](#)

4.1 eMerchandising Overview

eMerchandising is a module of the Oracle Marketing application that enables Web-based marketing and personalization. Designed to work seamlessly with Web storefronts, eMerchandising can be implemented with Oracle iStore or a an affiliate site.

4.1.1 Benefits of Implementing eMerchandising

The eMerchandising module of Oracle Marketing allows marketers to display personalized campaigns, offers and product recommendations to customers and prospects on iStore, Oracle Partner Portal, or any other designated storefront.

Benefits of implementing eMerchandising:

- **Increased demand:** The marketing messages sent to customers and leads can be customized to enhance the service, product, and brand awareness. This provides the ability to make relevant product recommendations to increase the up-sell and cross-sell opportunities, leading to a higher purchase value.
- **Improved profitability:** Marketers can display personalized marketing messages to their customers and prospects. By doing so, the customer experiences relevant and personal attention, helping to reduce customer attrition.
- **Improved productivity:** Personalized rules are created once, and are further re-used in different locations, reducing the need to recreate consistent personal marketing messages to customers and prospects.
- **Consistent messaging:** eMerchandising gives marketers direct control over which marketing messages are displayed and to whom they are displayed. By keeping the marketing messages aligned with the organization, messaging is clear and consistent.

4.2 Implementation Process Overview

An eMerchandising implementation must occur after the Oracle Marketing implementation is complete. To implement eMerchandising several initial tasks are accomplished in Oracle Marketing. For example, the Campaigns and Campaign Schedules (created in Oracle Marketing) are later used in the process of implementing an eMerchandising placement.

Although most tasks are completed during an Oracle Marketing implementation, additional tasks need to be completed for eMerchandising module.

Some tasks are required and others are optional. Regardless, you will perform 2 different general types of tasks:

- **Implementation tasks:** One-time tasks performed during or shortly after installation. Examples include: setting profile options and creating lookup values.
- **Administrative tasks:** Repetitive tasks performed post-installation. Examples include: creating web placements and implementing web postings.

4.3 Implementation Tasks

The following table lists various implementation and administrative tasks to be performed for eMerchandising.

Table 4–1 Implementation Task Overview

Task Name	Task Type	Requirement	Description
Implementing Mandatory Dependencies	Implementation	Required	Section 4.4, "Implementing Mandatory and Optional Dependencies"
Setting Up Web Postings	Implementation/ Administrative	Required	Section 4.5, "Implementing Web Postings"
Setting Up Web Placements	Implementation/ Administrative	Required	Section 4.6, "Implementing Web Placement"
Setting Up Guest User	Implementation	Required	Section 4.7, "Setting Up the Guest User"
Setting Up Web Placements	Implementation/ Administrative		Section 4.8, "Implementing Affiliate Placements"
Setting Up Stylesheets	Implementation	Optionally Required	Section 4.10, "Setting Up Stylesheets"
Integrating eMerchandising with Third-Party web storefronts	Implementation	Optional	Section 4.11, "Integrating eMerchandising with Third-Party Web Storefronts"

4.4 Implementing Mandatory and Optional Dependencies

To implement the mandatory and optional dependencies for eMerchandising use the following procedures:

- [Section 4.4.1, "Implementing Oracle Marketing"](#)
- [Section 4.4.2, "Implementing Oracle iStore"](#)
- [Section 4.4.3, "Implementing Oracle Partners"](#)

4.4.1 Implementing Oracle Marketing

Prior to implementing eMerchandising, Oracle Marketing must be properly implemented. For specific details see [Section 3, "Implementing Oracle Marketing"](#).

4.4.2 Implementing Oracle iStore

This step is mandatory only if it is integrated with iStore. See *iStore Implementation Guide* for details.

4.4.3 Implementing Oracle Partners

This step is optional and is required only if it is integrated with Partner Relationship Management. See *Partner Relationship Management Implementation Guide* for details.

4.5 Implementing Web Postings

A web posting is an object used to define personalized content that is dynamically selected and displayed at run-time in a placement. There are two types of postings:

- **Universal:** Applies the same merchandising strategy to all the visitors.
- **Rule Based:** Allows you to specify different merchandising strategies for different customers, using targeting conditions.

Web Postings allow 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.

To implement web postings use the following procedure:

- [Section 4.5.1, "Setting System Profiles"](#)
- [Section 4.5.2, "Verifying and Creating Lookups"](#)
- [Section 4.5.3, "Running Concurrent Programs"](#)
- [Section 4.5.4, "Setting System Administration Parameters"](#)
- [Section 4.5.5, "Verifying Web Posting Setup"](#)

4.5.1 Setting System Profiles

To set system profiles for web postings use the following procedure:

Prerequisites

- Oracle iStore and Oracle Partners are implemented, if required

Steps

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

The following table lists the System Profiles and their values.

Table 4–2 eMerchandising Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS : Item Validation Organization	Yes	Site	User Defined	This profile is used when validating the items that are used in posting definition and runtime. This will determine which items to be displayed when a product recommendation strategy is defined.
AMS : Custom Condition Class	Optional	Site	Java class name of the custom condition	This class is invoked at runtime when custom conditions are implemented.

Table 4–2 eMerchandising Profile Options

Option	Required	Level	Setting	Effect/Limitation
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.

4.5.2 Verifying and Creating Lookups

Use the following procedure to create and verify lookups:

Prerequisites

None

Steps

- 1. Log in to Oracle Forms with System Administrator responsibility.
- 2. Navigate to Functions > Setups > Lookups.
- 1. Choose View > Find to locate the individual keys.

The following table lists the Lookups and their types, values, and meanings.

Table 4–3 Web Posting Lookups

Key	Type	Values	Meanings
AMS_POST_CONTENT_TYPES	System	Product Schedule Offers	Product Web Advertisement Web Offers

Table 4–3 Web Posting Lookups

Key	Type	Values	Meanings
AMS_POST_STRATEGY_TYPE	System	Manual_Selection Product_Relationship Custom	Manually selected strategy Strategy based on product relationship 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	N/A
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_BUSPRIOR	User	Offer_Start_Date Offer_End_Datte	Offer start and end dates are used by Web Offers
IBE_RELATIONSHIP_TYPES	Extensibl e	Possible relationships between Products like Cross Sell, Up Sell.	This is an iStore lookup type.
AMS_POST_RELATIONSHIPS	System	Promoting Relationship types not covered by iStore	Promoting is a relationship not covered by iStore, as in promoting a product.

Table 4–3 Web Posting Lookups

Key	Type	Values	Meanings
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.

Note: For a Web offers to be displayed in Oracle Marketing, at the application level, set **QP: Source System Code** to Oracle Marketing.

4.5.3 Running Concurrent Programs

The following events will not refresh until the corresponding concurrent program has been run:

- Minisites (additional/new web storefronts) are created
- Campaign is created
- New offers is created
- New offers is associated to a campaign
- New items is created
- New items is assigned to minisite
- New items is assigned to a Campaign

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Applications > Functions > Profiles > Concurrent Requests.
3. Select Submit a New Request.

See the table below for concurrent managers and descriptions.

Table 4–4 eMerchandising Concurrent Programs

Concurrent Manager	Required	Description
AMS Web Execution: Specialty Store Items Refresh Program	Yes	Refreshes the denormalized table for minisites periodically to capture items in the iStore minisites.
AMS Web Execution: Campaign Items Refresh Program	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.
AMS Web Execution: Refresh Offer Parties and Products	Yes	Refreshes the Offer Denormalized tables. Marketing Online offers functionality will retrieve the Eligible Offers for any Products depending For Qualifying parties.

4.5.4 Setting System Administration Parameters

To set system administration parameters for eMerchandising use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Marketing using the Marketing Administrator responsibility.
2. Navigate to Administration > Marketing.
3. Set the following system parameters:

Table 4–5 eMerchandising System Parameters

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.

4.5.5 Verifying Web Posting Setup

Prerequisites

The following procedures should be completed:

- Set System Profiles
- Verify and Create Lookups for Web Postings
- Set up and Run Concurrent Manager Programs
- Administration Setup

Steps

1. Log in to Oracle Marketing.
2. Navigate to Marketing > Execution.
3. The Web Posting subtab should be displayed.
4. Click the Web Posting subtab.

The Posting Overview page should be displayed. This verifies that you have properly implemented web postings.

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

4.6 Implementing Web Placement

A web placement is a logical representation for a physical space on an application page where some content (returned by a posting) is displayed. You can activate a placement once you assign to it a posting and display style.

A web placement is identified by:

- A site
- A page
- Page parameters

Web Placements display personalized content selected through the Merchandising strategies. It display priorities as defined by the “Postings”, they are displayed in the specified location on the iStore or affiliate site.

The web placement functionality is the component that associates the posting and the style with a physical location (web page). Placement can be defined for a site, page, and a location.

After creating a posting and a placement, the `jsp`, `amsWebPlacement.jsp`, should be attached to the desired bins in *iStore* in order to display the posting in that bin. When adding the source file for speciality stores and language Mappings (using the template details page in *iStore*), select **All** from the Speciality Store drop down list. This ensures that the correct posting will be made in the proper placement in the correct Speciality Store.

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

To setup web placements use the following procedure:

Prerequisites

- If integrating with *iStore*, it must be implemented prior to beginning these steps. For additional information, see the *iStore Implementation Guide*.
- If integrating with Oracle Partners, it must be implemented prior to beginning these steps. For additional information, please see the *Partner Relationship Management Implementation Guide*.

To implement web placement, use the following procedures:

- [Section 4.6.1, "Setting System Profiles"](#)

- [Section 4.6.2, "Verify and Create Lookups for Web Placement"](#)
- [Section 4.6.3, "Setting System Administration Parameters"](#)
- [Section 4.6.4, "Associating iStore template with Web Placement"](#)
- [Section 4.6.5, "Testing Implementation of Web Placement"](#)

4.6.1 Setting System Profiles

Use this procedure to enter various System Profile Options for Web Placement. The following table lists the System Profiles and their values.

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Applications > Functions > Profiles > System.
3. Enter the profile name in the Profile Field and select Find.
4. Enter the appropriate value in the column corresponding to the level indicated.
5. Save your work.

Table 4–6 Web Placement System Profiles

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. This option must be set before creating an affiliate site.

Table 4–6 Web Placement System Profiles

Option	Required	Level	Setting	Effect/Limitation
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. This must be set before creating any affiliate placement definition. For example: http://YourHostName:PortNum
IBE: Use Web Placements	Optional	Application	Yes/No	Determines whether placements are displayed. Required only when implementing iStore.
PV: Enable Web Marketing	Optional	Site (see effect column)	Yes/No	Determines when Placements are displayed in Partners Online. Required only when implementing Partners Online. Setting levels: Application (Partner Relationship Management Online) and Responsibility (Vendor Admin)

4.6.2 Verify and Create Lookups for Web Placement

To verify Lookups for web placement use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Applications > Functions > Setup > 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.

The following table lists the LOVs and their types, values and meanings.

Table 4–7 Web Placement Lookups

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

4.6.3 Setting System Administration Parameters

Use the following procedure to set system parameters for web placements:

Prerequisites

None

Steps

- 1. Log in to Oracle Forms with System Administrator Responsibility.
- 2. Navigate to Setting > System > Advanced.
- 3. Make the following selections:

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).

4.6.4 Associating iStore template with Web Placement

The file, `amsWebPlacement.jsp` must be associated to the bins where the postings will appear. See *iStore Implementation Guide* for more details.

4.6.5 Testing Implementation of Web Placement

Use this procedure to verify if the implementation of Web Placement is correct.

Prerequisites

None

Steps

1. Log in to Oracle Marketing as the Marketing Administrator.
2. Navigate to the Execution tab.
3. The Web Placement subtab should be displayed.
4. Click the Web Placement subtab.

The Placement Overview page should be displayed.

4.7 Setting Up the Guest User

You must create this account before you can view your online stores. If you do not create a guest user account, marketers will be unable to view the content created for eMerchandising.

Use the following procedure to create the Oracle Marketing guest user account.

Prerequisites

None

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Navigate to Security > User > Define.

The Users window opens.

3. In the User Name field, enter a user name, such as `IBEGUEST`, by which a guest user will be automatically logged in to Oracle Marketing.

4. In the Password field, enter a password for this user name.
5. In the Responsibilities block, choose an Oracle Marketing customer responsibility, such as IBE_CUSTOMER, from the Responsibility LOV.
6. Save the user record.
7. Set the following profile options at the user level for the guest user name:
 - JTF_PROFILE_DEFAULT_APPLICATION
 - JTF_PROFILE_DEFAULT_CURRENCY
 - JTF_PROFILE_DEFAULT_RESPONSIBILITY
8. Set up this guest user account as the Oracle CRM Technology Foundation self service guest user. See *Oracle CRM Technology Foundation Concepts and Procedures* for instructions.

4.8 Implementing Affiliate Placements

The prerequisites to implement affiliate placements are given below:

- [Section 4.8.1, "Creating a Data Source for an Affiliate"](#)
- [Section 4.8.2, "Registering the Merchant as an Organization"](#)
- [Section 4.8.3, "Updating Merchant Party Profile"](#)
- [Section 4.8.4, "Registering a New Site"](#)
- [Section 4.8.5, "Registering the Affiliate"](#)
- [Section 4.8.6, "Associating Affiliates"](#)
- [Section 4.8.7, "Creating an Affiliate Placement"](#)

4.8.1 Creating a Data Source for an Affiliate

Use this procedure to create personalized postings for an affiliate site.

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.

For more information about Data Sources see [Section 3.25, "Setting Up Data Sources"](#).

4.8.2 Registering the Merchant as an Organization

This procedure needs only to be performed one time. Use it to create the merchant organization. This procedure enables you to add any number of affiliates as a registered affiliate of the merchant.

Prerequisites

None

Steps

1. Log in to Oracle Marketing as the Marketing Administrator.
2. Navigate to Marketing Online > Audience > Organization subtab.
3. Click Create or Quick Create.

The Create Organization or Quick Create Organization page appears.

4. Enter name of the organization in the Organization field.
5. Enter data in all the required fields.
6. Enter a name in the State field or Click Go to select a state.
7. Click Create.

4.8.3 Updating Merchant Party Profile

This procedure needs only to be performed one time.

Prerequisites

The merchant party exists

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to System > Profiles.
3. Search for 'AMS: Merchant Party Id' profile.
4. From the list of values, select the merchant you have created using the [Section 4.8.2, "Registering the Merchant as an Organization"](#) procedure.
5. Click Save.

4.8.4 Registering a New Site

Use this procedure to use placements and postings on a new CRM application or another (affiliate) Web site.

Prerequisites

The site must not exist

Steps

1. Navigate to Administration tab.
2. Select the Marketing horizontal navigation link.
3. Click the Execution > Sites side navigation link.
The Sites Setup page appears.
4. Select Create.

The Create Site page appears.

5. Select a Site Category from the drop-down list.

Note: If you select the site category as affiliate, dynamically the page changes and displays the Affiliate Name field. Select a Affiliate Name from the LOV.

6. To select a Site Name, click the Search icon.
 - a. The Site Category Selector window appears.
 - b. Select a site category. The selected Site category appears in the Site Name field.
7. Enter a unique name in Programmatic Access Name.
8. Optionally, enter a description.
9. Select Create.

4.8.5 Registering the Affiliate

Use the following procedure to create any number of affiliates.

Prerequisites

An affiliate site must exist

Steps

1. Log in to Oracle Marketing with Marketing Administrator responsibility.
2. Marketing > Audience > Organization subtab.
3. Click Create or Quick Create.

The Create Organization or Quick Create Organization page appears.
4. Enter name of the organization in the Organization field.
5. Enter data in all the required fields.
6. Enter a name in the State field or Click Go to select a state.
7. Click Create.

4.8.6 Associating Affiliates

Use the following procedure to create a relationship between the merchant and the affiliates.

Prerequisites

The merchant and an affiliate must exist.

Steps

1. Log in to Oracle Marketing with Marketing Administrator Responsibility.
2. Navigate to Marketing Online > Audience > Organization subtab.
3. In the Organization page, click the hyperlinked merchant (not an affiliate).
The Organization Detail page appears.
4. From the side navigation menu, select Relationship.
The Organization details page with the existing relationships for the selected merchant are displayed.
5. Click Add Relationship to add the organization as an affiliate to the selected organization.
The Add Organization to Organization Relationship page appears.
6. Click **Go** to select an organization.
The Select a Customer page appears displaying a list of all the existing organizations.
7. Select an organization and Click Create.
A relationship 'affiliate' is created between the merchant and the affiliate.
Follow this procedure to add any number of affiliates.

4.8.7 Creating an Affiliate Placement

Use this procedure to display a posting in an affiliate html page. Implement this step only once for the profile **AMS : Server URL**. This profile enables you to set up the server where the eMerchandising server is running. For example the value could `http://www.yourHostname.com:port_number`. This is a mandatory one time setup required before creating affiliate placements.

Prerequisites

None

Steps

1. Log in to Oracle Marketing with Marketing Administrator responsibility.
2. Navigate to Marketing > Administration > Marketing > Execution > Sites.
3. Select the Site Category as 'Affiliates' and allow the page to refresh.
4. Enter a site name for Site Name.
5. Pick a Affiliate from Affiliate LOV.
6. Provide a Programmatic Access Name for the site (i.e. a name to access this site programmatically. This name should not have any spaces).
7. Navigate to Administration > Marketing > Execution > Pages.
The Pages page appears.
8. Select a site from the drop-down list.
All the pages for the selected site are displayed.
9. Click Create.
10. Enter all the required fields.
11. Click Create.
12. Navigate to Execution > Web Placements.
13. Enter a name in Placement Name. For example, My Affiliate Placement.
14. Select status as Active.
15. Select a site name and allow the page to refresh. For example, My Affiliate Site.
16. Select a page name and allow the page to refresh. For example, homepage.
17. Select a location. For example, Top.
18. Select a posting from the posting LOV and let the page refresh.
19. Select a stylesheet from the stylesheet drop-down.
20. Click Create.
21. Placement will be created and the page will refresh with Placement Details screen. Towards the end of the Details screen, a View API link can be seen.

22. Click the link View API link.

This will display the API/script.

For example, The API that is to be embedded in an HTML may look something given below:

```
<!-- BEGIN Web Placements Tag -->
    <script language="JavaScript"
src="http://www.yourHostname.com:port_number/OA_
HTML/amsWebPlacementLink.jsp?site='MYAFFILIATE'&page='HOME'&location='TOP'"
>

    </script>
    <noscript>
    </noscript>
<!-- END Web Placements Tag -->
```

23. Cut and paste this script in your affiliate html page. For example, the script should be pasted in myAffiliate.html page.**24.** Call your html page - myAffiliate.html from the browser.

The posting should show up.

4.9 Implementing a Custom Strategy for Web Execution

To define a Custom Strategy, you have to first write a Java class that implements the interface Fireable. The following three sample Custom Strategy Java Classes are shipped with source code as examples:

- oracle.apps.ams.content.SampleCustomSchedSelector.java
- oracle.apps.ams.content.SampleCustomProdSelector.java
- oracle.apps.ams.content.SampleCustomOfferSelector.java

Prerequisites

None

Steps

1. Log in to Oracle Marketing with Marketing Administrator responsibility.
2. Navigate to Administration >Marketing >Execution.
3. Click Strategies.

The Strategies Setup Page appears.

4. Click Create.
5. Enter name, description, and maximum items returned.
6. Select a Content Type. For example, Web Offers.
7. In the Java Class field, enter the custom java class name. For example, `oracle.apps.ams.content.SampleCustomOfferSelector`.
8. Click Create.

4.9.1 Custom Strategy Sample

The following sample custom strategy java classes are provided in this section:

- [Section 4.9.1.1, "Sample Custom Schedule Selector"](#)
- [Section 4.9.1.2, "Sample Custom Product Selector"](#)
- [Section 4.9.1.3, "Sample Custom Offer Selector Java Class"](#)

Important: 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. Note the Content Type you are defining the Custom Strategy for. Once your Custom Java Class is registered under a name, it can be used in Universal or Rule Based Postings only if the strategy types is "Custom".

4.9.1.1 Sample Custom Schedule Selector

`SampleCustomSchedSelector.java` retrieves the Active Internet Advertisements Campaign Schedules that have been created within last 30 days from the current date depending on the Business priorities and priority order.

```
/*Sample Java class SampleCustomSchedSelector, within the last 30 days Active
Internet Advertisements Campaign Schedules.
*/
```

```
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.PostingsSQLUtil;
import oracle.apps.ams.common.ContentCollector;
import oracle.apps.ams.common.FastVector;
import oracle.apps.ams.common.AMSLogger;
import oracle.apps.ams.common.Randomizer;

/* OSO */
import oracle.apps.asf.util.OSOException;

/**
 ** The sample Custom Strategy class
 */

public class SampleCustomSchedSelector implements Fireable
{
    public static final String RCS_ID = "$Header: SampleCustomSchedSelector.java
115.11 2002/12/27 10:11:41 sikalyan ship $" ;
    public static final boolean RCS_ID_RECORDED =
        VersionInfo.recordClassVersion(RCS_ID, "oracle.apps.ams.content");
    public static final String _THISCLASS = "SampleCustomSchedSelector";

    /**
     * Tries to find the Schedules that have been added within last 30 days from
     * sysdate. So, if you added 3 such Schedules 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

```



```

- 'Schedule' in this case
    , ContentCollector p_ccContentIds //returned Schedule 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
- Dates
    , 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=null;

    try
    {
        //first get a Database Connection
        conn =
(oracle.jdbc.driver.OracleConnection)TransactionScope.getConnection();

        //then prepare the query

```

```
StringBuffer sb = new StringBuffer();

sb.append(" select schedule_id");
sb.append(" from ");
    sb.append(" ( select schedule_id");
    sb.append(" from ams_campaign_schedules_b acs ");
if (p_strBusPrior.equalsIgnoreCase(m_busPrior_cs_prt))
    sb.append(" , ams_lookups al ");
sb.append(" where status_code = 'ACTIVE'");
    sb.append(" and active_flag = 'Y'");
    sb.append(" and NVL(start_date_time, sysdate) >= sysdate-30");
    sb.append(" and NVL(end_date_time, sysdate) >= sysdate");
    sb.append(" and activity_type_code = 'INTERNET'");
    sb.append(" and activity_id = 30");

    if (p_strBusPrior.equalsIgnoreCase(m_busPrior_cs_prt))
    {
        sb.append(" and al.lookup_type = 'AMS_PRIORITY'");
        sb.append(" and NVL(acs.priority, 'LOW') = al.lookup_code");
        sb.append(" order by al.tag ");
        if (p_strBusPriorOrder.equalsIgnoreCase(m_busPrior_order_asc) )
            sb.append(" DESC ");
        }

        else if (p_strBusPrior.equalsIgnoreCase(m_busPrior_cs_sdt))
        {
            sb.append(" order by start_date_time ");
            if (p_strBusPriorOrder.equalsIgnoreCase(m_busPrior_order_desc))
                sb.append(" DESC ");
            }

        else if (p_strBusPrior.equalsIgnoreCase(m_busPrior_cs_edt))
        {
            sb.append(" order by end_date_time ");
            if (p_strBusPriorOrder.equalsIgnoreCase(m_busPrior_order_desc))
                sb.append(" DESC ");
            }

        }

    sb.append(" ) ");
    sb.append(" where rownum <= ?");

pstmt = conn.prepareStatement( sb.toString());
```

```

        //max count returnable from this Strategy
        pstmt.setInt(1, 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));
        }
        // get the Random Schedules

        if(p_strBusPrior.equals(m_busPrior_random) && (temp != null))
            p_ccContentIds = (p_intMaxAllowed >= 1 ? this.getRandomValues(p_
ccContentIds):p_ccContentIds);

    }
    catch(Exception e)
    {
        AMSLogger.log(_THISCLASS
                        , l_strMethodName
                        , "Exception"
                        , AMSLogger.DEBUG);
    }
    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;
}

/**
 * @return Random Schedules in the ContentCollector
 */
public ContentCollector getRandomValues(ContentCollector p_ccContentIds)
{
    ContentCollector shuffledIds=null;
    com.sun.java.util.collections.List originalIds = null;
    int i,j;
    Object swap;

    Randomizer random = new Randomizer(System.currentTimeMillis());
    try
    {

        if (p_ccContentIds.getSize() > 1 )
        {
            originalIds = p_ccContentIds.getContentList();
            shuffledIds = new ContentCollector(p_ccContentIds.getSize());
            for(int k=0;k<p_ccContentIds.getSize();k++)
            {
                i = random.nextInt(p_ccContentIds.getSize());
                j = random.nextInt(p_ccContentIds.getSize());
```

```

        if (i <= p_ccContentIds.getSize() && j <= p_ccContentIds.getSize() )
        {
            swap = originalIds.get(i);
            originalIds.set(i,originalIds.get(j));
            originalIds.set(j,swap);
        }
    }

    for(int k=0;k<p_ccContentIds.getSize();k++)
    {
        shuffledIds.addContent(originalIds.get(k));
    }

    //return Random Schedules
    return  shuffledIds;
}
else
{
    return  p_ccContentIds;
}

}

catch (Exception e)
{
    return  p_ccContentIds;
}
}

}

```

4.9.1.2 Sample Custom Product Selector

SampleCustomProdSelector.java retrieves the products that have been added within last 30 days from the current date depending on the business priorities and priority order.

```

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.PostingsSQLUtil;
import oracle.apps.ams.common.ContentCollector;
import oracle.apps.ams.common.FastVector;
import oracle.apps.ams.common.AMSLogger;
import oracle.apps.ams.common.Randomizer;

/* 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
115.7 2002/12/23 04:38:02 sikalyan ship $" ;
    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 // Priority Order for list price
                    , 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 = null;

        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 ");
sb.append(" ( " );
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'");

if(p_strBusPrior.equalsIgnoreCase(m_busPrior_prod_price))
{
    sb.append(" order by list_price_per_unit ");
    if (p_strBusPriorOrder.equalsIgnoreCase(m_busPrior_order_desc))
sb.append(" DESC");
}

sb.append( " ) ");
sb.append(" where 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));
        }

        //get the Random Products
        if(p_strBusPrior.equals(m_busPrior_random) && (temp != null))
            p_ccContentIds = (p_intMaxAllowed >= 1 ?
                this.getRandomValues(p_ccContentIds,p_objContext):p_ccContentIds);
    }

    catch(Exception e)
    {
        AMSLogger.log(_THISCLASS
            , l_strMethodName
            , "Exception"
            , AMSLogger.DEBUG);
    }

    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)
    {
        AMSLogger.log(_THISCLASS
                    , l_strMethodName
                    , "Exception"
                    , AMSLogger.DEBUG);
    }
}
//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;
}

/**
 * @return Random Products in the ContentCollector
 */
public ContentCollector getRandomValues(ContentCollector p_
ccContentIds,ExecutionContext ec)
{
    ContentCollector shuffledIds=null;
    com.sun.java.util.collections.List originalIds = null;
    int i,j;
    Object swap=null;
    Randomizer random = new Randomizer(System.currentTimeMillis());
    if (p_ccContentIds.getSize() > 1 )
    {
```

```

        originalIds = p_ccContentIds.getContentList();
        shuffledIds = new ContentCollector(p_ccContentIds.getSize());
        for(int k=0;k<=p_ccContentIds.getSize();k++)
        {
            i = random.nextInt(p_ccContentIds.getSize());
            j = random.nextInt(p_ccContentIds.getSize());
            if (i <= p_ccContentIds.getSize() && j <= p_ccContentIds.getSize() )
            {
                swap = originalIds.get(i);
                originalIds.set(i,originalIds.get(j));
                originalIds.set(j,swap);
            }
        }

        for(int k=0;k<p_ccContentIds.getSize();k++)
        {
            shuffledIds.addContent(originalIds.get(k));
        }

        //return Random Products
        return  shuffledIds;
    }
    else
    {
        return  p_ccContentIds;
    }
}
}

```

4.9.1.3 Sample Custom Offer Selector Java Class

SampleCustomOfferSelector.java retrieves the Active Ask for Offers that have been attached to the Active Internet Promotion Campaign Schedules of the Parent Campaign Schedule that have been created within last 30 days from the current date depending on the Business priorities and priority order.

```

package oracle.apps.ams.content;

/* JDK*/
import java.sql.SQLException;
import java.math.BigDecimal;
import java.util.Random;

```

```

/* 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.PostingsSQLUtil;
import oracle.apps.ams.common.ContentCollector;
import oracle.apps.ams.common.FastVector;
import oracle.apps.ams.common.AMSLogger;
import oracle.apps.ams.common.Randomizer;

/* OSO */
import oracle.apps.asf.util.OSOException;

/**
 ** The sample Custom Strategy class
 */

public class SampleCustomOfferSelector implements Fireable
{
    public static final String RCS_ID = "$Header: SampleCustomOfferSelector.java
115.2 2002/12/26 18:09:13 sikalyan noship $" ;
    public static final boolean RCS_ID_RECORDED =
        VersionInfo.recordClassVersion(RCS_ID, "oracle.apps.ams.content");
    public static final String _THISCLASS = "SampleCustomOfferSelector";

    /**
     * Tries to find the Weboffers that have been added within last 30 days from

```

```

* sysdate. So, if you added 3 such Weboffers 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
- 'Offer' in this case
                , ContentCollector p_ccContentIds //returned Offer 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
Dates
                , 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=null;

    try

```

```
{
    //first get a Database Connection
    conn =
    (oracle.jdbc.driver.OracleConnection)TransactionScope.getConnection();

    //then prepare the query
    StringBuffer sb = new StringBuffer();

    sb.append("select list_header_id ");
    sb.append(" from ");
    sb.append(" ( select qlhv.list_header_id ");
    sb.append(" from ams_act_offers aao,qp_list_headers_vl qlhv,ams_campaign_
schedules_vl csch,ams_campaigns_vl camp ");
    sb.append(" where aao.arc_act_offer_used_by = 'CSCH' and aao.qp_list_
header_id = qlhv.list_header_id ");
    sb.append(" and aao.act_offer_used_by_id = csch.schedule_id and camp.campaign_
id = csch.campaign_id ");
    sb.append(" and qlhv.active_flag = 'Y' ");
    sb.append(" and NVL(trunc(qlhv.start_date_active),trunc(sysdate)) >=
trunc(sysdate) - 30 ");
    sb.append(" and NVL(trunc(qlhv.end_date_active),trunc(sysdate)) >=
trunc(sysdate) ");
    sb.append(" and qlhv.ask_for_flag='Y' and csch.status_code='ACTIVE' ");
    sb.append(" and csch.activity_id=40 ");

    if (p_strBusPrior.equalsIgnoreCase(m_busPrior_of_sdt))
    {
        sb.append(" order by qlhv.start_date_active ");
        if (p_strBusPriorOrder.equalsIgnoreCase(m_busPrior_order_desc))
            sb.append(" DESC ");
    }

    else if (p_strBusPrior.equalsIgnoreCase(m_busPrior_of_edt))
    {
        sb.append(" order by qlhv.end_date_active ");
        if (p_strBusPriorOrder.equalsIgnoreCase(m_busPrior_order_desc))
            sb.append(" DESC ");
    }

    sb.append(" ) ");
    sb.append(" where rownum <= ?");

    pstmt = conn.prepareStatement( sb.toString());
```

```

//max count returnable from this Strategy
pstmt.setInt(1, 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));
}

//get the Random WebOffers

if(p_strBusPrior.equals(m_busPrior_random) && (temp != null))
    p_ccContentIds = (p_intMaxAllowed >= 1 ? this.getRandomValues(p_
ccContentIds):p_ccContentIds);

}
catch(Exception e)
{
}
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;
}

/**
 * @return Random WebOffers in the ContentCollector
 */
public ContentCollector getRandomValues(ContentCollector p_ccContentIds)
{
    ContentCollector shuffledIds=null;
    com.sun.java.util.collections.List originalIds = null;
    int i,j;
    Object swap=null;
    Randomizer random = new Randomizer(System.currentTimeMillis());
    if (p_ccContentIds.getSize() > 1 )
    {
        originalIds = p_ccContentIds.getContentList();
        shuffledIds = new ContentCollector(p_ccContentIds.getSize());
        for(int k=0;k<p_ccContentIds.getSize();k++)
        {
            i = random.nextInt(p_ccContentIds.getSize());
            j = random.nextInt(p_ccContentIds.getSize());
            if (i <= p_ccContentIds.getSize() && j <= p_ccContentIds.getSize() )
            {
                swap = originalIds.get(i);
                originalIds.set(i,originalIds.get(j));
                originalIds.set(j,swap);
            }
        }
    }
}
```



```

        for(int k=0;k<p_ccContentIds.getSize();k++)
        {
            shuffledIds.addContent(originalIds.get(k));
        }
        //return Random WebOffers
        return  shuffledIds;
    }
    else
    {
        return  p_ccContentIds;
    }
}

```

4.9.2 Setting Up A Custom Condition

Rule Conditions can be extended by using the values returned by the custom condition java class. Up to five custom conditions can be defined.

To use the extended rule conditions, you have to first write a Java class that implements the interface "*CustomCondition*". A sample java class is shipped with the product.

To implement a custom condition follow the procedure below:

Prerequisites

None

Steps

1. Log in to Oracle Marketing as Marketing Administrator.
2. Navigate to Marketing > Administration > Marketing sub tab.
 1. Click Execution from the side navigation menu.
The Conditions Setup page appears.
 2. Click Create.
The Create Conditions page appears.
 3. Enter a condition name and description.
 4. Select a data type from the drop-down list.
 5. Select an Operator from the drop-down list.
 6. Enter a Default value for the condition.

- 7. Click Create.

This class has to be registered in the system as a "site" level profile value. The name of the profile is AMS: Custom Condition Class.

4.10 Setting Up Stylesheets

Postings are displayed using stylesheets. They can be customized to match the look and feel of the site implementing eMerchandising.

Use the following procedure to register a new style for use in placements. You can also use this procedure to update and restore a style by first selecting a style.

Prerequisites

A stylesheet with content type must exist

Steps

- 1. Navigate to Administration tab.
- 2. Click the Marketing horizontal navigation link.
- 3. Click the Execution > Styles side navigation link.
The Styles Setup page appears.
- 4. Select a content type.
- 5. Click Create.
- 6. Create a new style by entering style name, stylesheet filename with extension xsl, and description.
- 7. Click Create to upload the XSL file.

4.10.1 Seeded Stylesheets

The following stylesheets are seeded:

Table 4–8 Seeded Stylesheets

Name	Description	File Name
Schedule banner	Displays content having full banner, half banner, and short description attributes	amscpns1.xsl

Table 4–8 Seeded Stylesheets

Name	Description	File Name
Schedule micro image	Displays content having micro bar images, short description and description attributes.	amscpn3.xml
Universal schedule	Displays any type of content independent of any specific content attribute.	amspstng.xml
Product short description	Displays a link to the product detail page along with a short description.	amsprod1.xml
Product thumbnail image	Displays a link to the product detail page along with a thumbnail image.	amsprod2.xml
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.xml
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.xml
Offer banner	Displays content having full banner, half banner, and short description attributes	amsoffer1.xml
Offer micro image	Displays content having micro bar images, short description and description attributes.	amsoffer3.xml
Universal Offer	Displays any type of content independent of any specific content attribute.	amsofpstng.xml

4.10.2 Creating Custom Stylesheets

To implement a custom style sheet follow the procedure below:

- [Section 4.10.2.1, "Web Offers XML Structure"](#)
- [Section 4.10.2.2, "Schedule XML Structure"](#)
- [Section 4.10.2.3, "Product XML Structure"](#)

4.10.2.1 Web Offers XML Structure

The following is a sample XML structure for Web offers. You can create your own stylesheets and customize its look and feel.

```
<Array length="2">
  <Posting pid="10087" DisplayName="Hey Click here">
    <Offer>
      <AttachmentLst>
        <WebAttachment
          ImageFileLocation="jtfDownload.jsp?fileid=xxxx"
          TrackingURL=" amstracking.jsp?wcid=11648">
            <WebAttachmentDetails>
              <AttachmentType>WEB_IMAGE</AttachmentType>
              <AttachmentSubType>FULL_BANNER</AttachmentSubType>
              <DisplayHeight>0</DisplayHeight>
              <DisplayWidth>0</DisplayWidth>
              <AlternateText>BuyIt!</AlternateText>
            </WebAttachmentDetails>
          </WebAttachment>
        </AttachmentLst>
      </Offer>
    </Offer>
    <AttachmentLst>
      <WebAttachment
        ImageFileLocation="jtfDownload.jsp?fileid=ZGD9D16E"
        TrackingURL="amstracking.jsp?wcid=11648">
          <WebAttachmentDetails>
            <AttachmentType>WEB_IMAGE</AttachmentType>
            <AttachmentSubType>HALF_BANNER</AttachmentSubType>
            <DisplayHeight>60</DisplayHeight>
            <DisplayWidth>234</DisplayWidth>
            <AlternateText>WebOffer</AlternateText>
          </WebAttachmentDetails>
        </WebAttachment>
      <WebAttachment
        ImageFileLocation="jtfDownload.jsp?fileid=ZGDA0433"
        TrackingURL="amstracking.jsp?wcid=11668">
          <WebAttachmentDetails>
            <AttachmentType>WEB_IMAGE</AttachmentType>
            <AttachmentSubType>HALF_BANNER</AttachmentSubType>
            <DisplayHeight>60</DisplayHeight>
            <DisplayWidth>234</DisplayWidth>
            <AlternateText>SimpleOffer</AlternateText>
          </WebAttachmentDetails>
        </WebAttachment>
      </AttachmentLst>
    </Offer>
  </Posting>
</Array>
```

```

    </Offer>
  </Posting>
</Array>

```

4.10.2.2 Schedule XML Structure

The following is a sample XML structure for schedules. You can create your own stylesheets and customize its look and feel.

```

<Array length="1">
  <Posting DisplayName="Schedule Example">
    <Schedule>
      <AttachmentLst>
        <WebAttachment ImageFileLocation="jtfDownload.jsp?fileId=123"
                      TrackingURL="amstracking.jsp?wcid=123">
          <WebAttachmentDetails>
            <AttachmentType>WEB_IMAGE</AttachmentType>
            <AttachmentSubType>FULL_
BANNER</AttachmentSubType>
            <DisplayHeight>0</DisplayHeight >
            <DisplayWidth>0</DisplayWidth>
            <AlternateText>aaa</AlternateText>
          </WebAttachmentDetails>
        </WebAttachment>

        <WebAttachment ImageFileLocation="jtfDownload.jsp?fileId=456"
                      TrackingURL="amstracking.jsp?wcid=456">
          <WebAttachmentDetails>
            <AttachmentType>WEB_IMAGE</AttachmentType>
            <AttachmentSubType>HALF_
BANNER</AttachmentSubType>
            <DisplayHeight>0</DisplayHeight >
            <DisplayWidth>0</DisplayWidth>
            <AlternateText>bbb</AlternateText>
          </WebAttachmentDetails>
        </WebAttachment>

      </AttachmentLst>
    </Schedule>
  </Posting>
</Array>

```

4.10.2.3 Product XML Structure

The following is a sample XML structure for product. You can create your own stylesheets and customize its look and feel.

```
<Array length="1">
<Posting DisplayName="Product Example">
  <Product>
    <ShortDescription>Laptop</ShortDescription>
    <Description>The Best Laptop</Description>
    <ShoppingCartLink>ibeCzzpEntry.jsp?a=b</ShoppingCartLink>
    <ProductDetailLink>ibeCzzpEntry.jsp?c=d</ProductDetailLink>
    <Thumbnail>/OA_MEDIA/lp_th.gif</Thumbnail >
    <SmallImage>/OA_MEDIA/lp_sm.gif</SmallImage >
    <LargeImage>/OA_MEDIA/lp_lg.gif</LargeImage >
  </Product>
</Posting>
</Array>
```

4.11 Integrating eMerchandising with Third-Party Web Storefronts

Integrating eMerchandising with Third-Party Web stores enables customers to create segments in Marketing Online. These segments can be resued in rule-based posting conditions to personalize Web Ads. The Web Ads can be on sites such as the corporate Web site, or an employee portal built with Oracle Portal. This feature is also available even if the database storing the members of these sites are not in the TCA.

Web execution may be implemented by other application through JSP pages or HTML Pages.

For example, suppose a campaign schedule is to be displayed on the homepage

- Site = MYSITE
- Page = HOME
- Location(s) = TOP_CENTER and UPPER_RIGHT

To integrate eMerchandising with Third-Party Web Storefronts use the following procedures:

[Section 4.11.1, "Prerequisite Procedures"](#)

[Section 4.11.2, "Implementing Web Execution through JSP Pages"](#)

[Section 4.11.3, "Implementing Web Execution through HTML Pages"](#)

4.11.1 Prerequisite Procedures

The following steps must be performed prior to implementing a web execution through JSP or HTML pages.

Steps

1. Define a Site in the Site definition screen (Marketing Online > 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 (Marketing Online > 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 (Marketing Online > Execution > Web Postings).
5. Define a Placement in the Placement definition screen (Marketing Online > Execution > Web Placements).

4.11.2 Implementing Web Execution through JSP Pages

In order to implement Web Execution through jsp pages, use the following steps.

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

4.11.3 Implementing Web Execution 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 java script 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 -->  
-----
```

Implementing Data Mining

This chapter includes implementation and administration tasks for implementing Oracle Marketing Data Mining functionality.

Topics include:

- [Section 5.1, "Oracle Marketing Data Mining Overview"](#)
- [Section 5.2, "Implementation Process Overview"](#)
- [Section 5.3, "Implementation Tasks"](#)
- [Section 5.4, "Setting Up Data Mining"](#)
- [Section 5.5, "Setting Up Custom Model Types"](#)
- [Section 5.6, "Setting Up Data Sources and Targets"](#)
- [Section 5.7, "Data Mining Customer Attributes"](#)

5.1 Oracle Marketing Data Mining Overview

Oracle Data Mining (ODM) is a process used to discover strong patterns and relationships in large amounts of data. These patterns and relationships are used to accurately predict customer and prospects behavior.

A marketer can build “Models” to predict segments of the population to target in future campaigns. Oracle Marketing ships with seeded models, however, custom models can also be created.

A marketer can generate lists of customers and prospects based on ODM predictions. Generated lists are used by marketing activities such as, campaign Schedules and Event Schedules.

The following Model Types are available:

- **Response:** Used to predict customers/prospects that are most likely to respond to your e-mail, telemarketing, or direct mail campaign.
- **Loyalty:** Used to predict individuals or businesses that are most likely to defect from your organization, so you can try to prevent them from defecting and convert them to loyal customers.
- **Custom:** Used to predict the value of any customer data attribute in the Oracle TCA customer data model or in a user-defined data source for customer information. For example, marketers can set up a custom model to predict financial risk based on a credit score attribute, or a custom model to predict likelihood of high credit card balances vs. low balances.

5.2 Implementation Process Overview

Oracle Marketing ships with defaults and seed data enabling implementation with limited customizations and post-installation procedure. After installing Oracle Marketing several implementation and administrative tasks must be performed to ensure that ODM is configured to fit your business needs.

Some tasks are required and others are optional. Optional procedures need only be performed if the functionality provided is mandated by your business requirements.

ODM tasks are grouped as follows:

- **Implementation tasks:** One-time tasks performed post-installation. Examples include -- setting system profiles and lookup values.

- **Administrative tasks:** Repetitive administrative tasks performed post-installation. Examples include -- setting up user-defined data sources and targets.

5.3 Implementation Tasks

The following table lists various implementation and operational tasks for Oracle 9i Data Mining (ODM).

Table 5–1 Implementation Process Overview

Task Name	Task Type	Requirement	Description
Setting Up Data Mining	Implementation	Required	Section 5.4, "Setting Up Data Mining"
Setting Up Custom Model Types	Administrative	Optional	Section 5.5, "Setting Up Custom Model Types"
Setting Up User-Defined Data Sources	Administrative	Optional	Section 5.6, "Setting Up Data Sources and Targets"

5.4 Setting Up Data Mining

Prior to performing administrative tasks you must implement Data Mining functionality. The instructions below assume that ODM and Oracle Marketing are installed on the same database instance.

To set up Data Mining follow the procedures below:

- [Section 5.4.1, "Setting up the ODM Property File"](#)
- [Section 5.4.2, "Running the SQL Script"](#)
- [Section 5.4.3, "Setting Up the Concurrent Manager Environment"](#)
- [Section 5.4.4, "Setting System Profiles"](#)
- [Section 5.4.5, "Run Concurrent Programs"](#)

Prerequisites

- Oracle Marketing is implemented
- Trading Community Architecture (TCA) is implemented
- Interactions History is implemented
- Accounts Receivable is implemented

- Oracle Quoting-Forms is implemented
- Field Service is implemented (used as data sources for customer information)
- Oracle 9i Data Mining version 9.2.0 is implemented

5.4.1 Setting up the ODM Property File

The ODM property file contains configuration parameters used by the Data Mining program.

To set up the ODM property file, use the following procedure:

Prerequisites

None

Steps

1. Open a text editor.
2. Using the following template, create a new file.

```
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 following is a description of each parameter in the template:

Table 5–2 ODM Property File Parameters

Parameter	Description
miningServer.url	JDBC connection string for the database where ODM is installed.
miningServer.userName	ODM username connecting to data mining server.
miningServer.password	Password for ODM user.
discretization.binnedBuildDataSchemaName	Database schema to which the data mining engine writes binned data during the model building process.
applyInput.schemaName	Database schema in which the input data for scoring is located.

Table 5–2 ODM Property File Parameters

Parameter	Description
applyOutputResult.schemaName	Database schema in which the scoring output results are written.
inputData.DBLinkName	Database link used to select input data from the CRM database to the ODM database. This entry is optional is only required when ODM and Oracle Marketing are in different database instances.

3. Save file as \$APPL_TOP/java/amsodm.property.

5.4.2 Running the SQL Script

The input data evaluated by the Data Mining server resides in the APPS schema. The script (shown below) gives read-only permission to the ODM schema for some APPS views. It also creates synonyms for the APPS views in the ODM schema. This Script is required when ODM and APPS are installed in the same database instance.

The script accomplishes the following:

- Grants SELECT access to the ODM schema to read from three APPS views.
- Creates synonyms to the three APPS views in the ODM schema.

The scripts requires the following parameters:

- <apps-username> APPS schema name
- <apps-password> APPS password
- <odm-username> ODM schema name
- <odm-password> ODM password

To run the SQL script follow the procedure below:

Prerequisites

Oracle Data Mining (ODM) is installed

Steps

1. Navigate to the \$APPL_TOP/ams/11.5.0/patch/115/sql directory.
2. Run the amsdmodm.sql as follows:

```
sqlplus <apps_username>/<apps_password>
```

```
@<db_connection_info>  
@amsdmodm.sql <apps_username> <apps_password> <odm_username> <odm_password>
```

5.4.3 Setting Up the Concurrent Manager Environment

The Concurrent Manager must be upgraded to JDK 1.3. The Data Mining Java Concurrent Programs require ODM Java classes which are not installed by the standard CRM installation. Therefore, they must be manually configured in the CLASSPATH of the concurrent manager program. AF_CLASSPATH is the environment variable containing directory information for java classes.

To set up the Concurrent Manager Environment follow the procedure below:

Prerequisites

- JDK 1.3 must be installed. If JDK 1.3 is not installed, then follow the instructions in the Oracle Technical Note: “Upgrading to JDK 1.3 with Oracle Applications 11i Concurrent Processing Node.”
- JDBC 9.2.0.2 patch must be installed - see Metalink for ARU information

Steps

1. Open \$APPL_TOP/admin/adovars.env.
2. Add the following to the AF_CLASSPATH:
\$ORACLE_HOME/dm/lib/odmapi.jar
iAS 1.0.22 \$ORACLE_HOME/rdbms/jlib/aqapi.jar
iAS 1.0.22 \$ORACLE_HOME/rdbms/jlib/jmscommon.jar
\$APPL_TOP/java/jdbc12.zip
\$APPL_TOP/java/nls_charset12.zip

5.4.4 Setting System Profiles

Use the table below to set system profiles as mandated by your business requirements.

Table 5–3 Data Mining System Profiles

Option	Required	Level	Setting	Effect/Limitation
AMS : Data Mining Engine Output Schema	Yes	Site	Free form text corresponding to the scoring output schema.	The scoring run result processing program will use the scheme specified to fetch the results.
AMS : Data Mining Engine Property File	Yes	Site	Free form text corresponding to the location of the property file created in Section 5.4.1, "Setting up the ODM Property File"	The Java Concurrent Program will use the property file indicated in the profile option value to invoke program settings by calling ODM 9i APIs.
AMS : Data Mining Debug Enabled	No	User	Default value is No. When set to Yes, debug is turned on, when set to No, debug is turned off.	Enables debugging information to be written in the concurrent request log.

For a detailed list of Oracle Marketing System Profiles see [Section A.3, "Oracle Marketing System Profiles"](#)

5.4.5 Run Concurrent Programs

Use the table below to run concurrent programs as mandated by your business requirements.

Table 5–4 Data Mining Concurrent Programs

Concurrent Manager	Required	Responsibility	Description
Workflow Background Process	Yes	System Administrator	Parameters Form: ■ Item Type: AMS Data Mining - Build/Score/Preview ■ Minimum Threshold: Leave blank. ■ Maximum Threshold: Leave blank. ■ Process Deferred: Yes ■ Process Timeout: Yes ■ Process Stuck: Yes For the Workflow daemon to monitor data mining workflow requests, a frequency of 30 minutes should be sufficient.
AMS Expire Data Mining Models	Optional	Oracle Marketing Administrator	Background process monitoring data mining models for expiration. A frequency of once a day should be sufficient.
AMS Update Data Mining Party Details	Optional	Oracle Marketing Administrator	Updates detail information collected on parties. The frequency should be the same as the Customer Intelligence Model (BIC) Summary Extraction process.

For more information on BIC see *Oracle Customer Intelligence Implementation Guide Release 11.5.6*.

5.5 Setting Up Custom Model Types

In addition to the existing Model types Custom Model types can be created. This feature enables marketers to predict user-defined customer behaviors.

A Custom Model type can be created to predict the value of any customer data attribute in the Oracle TCA customer data Model or in any user-defined data source for customer information. This feature enables users to Model any binary (Yes/No) customer behavior.

For example, marketers can set up a custom Model to predict financial risk (based on a credit score attribute or a custom Model) to predict likelihood of high credit card balances.

To create Custom Model Types, use the following procedure:

- [Section 5.5.1, "Add New Lookup Code"](#)
- [Section 5.5.2, "Restart HTTP Server"](#)
- [Section 5.5.3, "Verify New Model Type"](#)

This chapter covers how to set up custom model types, for information on creating a Response or Loyalty Model see the *Oracle Marketing User's Guide*.

5.5.1 Add New Lookup Code

To create a new lookup code for the custom Model type, use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with Oracle Marketing Administrator Responsibility.
2. Navigate to Setups > Lookups.
3. Add your new model type to the Lookup Type: AMS_DM_MODEL_TYPE.
 - **Code:** Use this field to name the new model type.
 - **Meaning:** This will be the display name (in the Oracle Marketing drop-down menu) for the custom model type.
 - **Description:** Optional description of the custom model type.
4. Save your work.

5.5.2 Restart HTTP Server

Lookup types are cached in the HTTP Server. Therefore, after creating a new lookup type, you must restart the HTTP server to refresh the data. The exact procedures for this step will vary depending on your environment.

5.5.3 Verify New Model Type

In order to begin using a new model type, you will need to setup the target field that the new model type will be predicting. For more information about creating target fields see [Section 5.6.4, "Creating Targets"](#).

To verify the new model type, use the procedure below:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Analytics > Targets.
3. Select Create.

The Create Target page opens.

4. Select the Model Type LOV. The custom Model Type is visible in the drop-down menu shown below:

Figure 5–1 Custom Model Type

Create Target
Specify the required information to create a Target for any Model Type and Data Source.

Create Clear

*Name *Model Type Custom

*Data Source Snni Data source *Target Field Custom

Direct Mail Response

E-Mail Response

Loyalty/Retention

Telemarketing Response

Description

* indicates required field

5.6 Setting Up Data Sources and Targets

Oracle Marketing analytics uses data sources and targets to describe the data that is being used by Data Mining.

- The **data source** is a database table or view mapping.
- The **target** is a mapped field in the database. For the purpose of analytics, it represents the customer behavior you are trying to predict.

To understand and implement data sources and targets see the following:

- [Section 5.6.1, "Seeded Data Sources"](#)
- [Section 5.6.2, "Modifying Seeded Data Sources"](#)
- [Section 5.6.3, "Creating User-Defined Data Sources"](#)
- [Section 5.6.4, "Creating Targets"](#)

5.6.1 Seeded Data Sources

Oracle Marketing ships with seeded data sources and targets. The data sources are editable but should be used as templates. By default, all seeded attributes are active. The Administrator must deactivate fields to be excluded from the data mining analysis.

Seeded Data Sources

The following data sources are seeded:

- TCA Persons
- TCA Organization Contacts

Seeded Targets

The following Targets are seeded:

- B2C: Direct Mail Responders
- B2B: Direct Mail Responders
- B2C: E-mail Responders
- B2B: E-mail Responders
- B2C: Loyalty/Retention
- B2B: Loyalty/Retention
- B2C: Telemarketing Responders
- B2B: Telemarketing Responders

5.6.2 Modifying Seeded Data Sources

To modify seeded data sources to fit your business requirements, use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Analytics > Data Sources.
3. Open the seeded data source.
4. To edit, select the link for data source.
5. On the Data Source details page, the following fields can be edited:
 - **Name:** Name of data source
 - **Description:** Description for the data source
 - **Use for Data Mining:** Enable or disable fields to be used for Data Mining
 - **Source Field Label:** Display name for the field
 - **Auto Binning:** Binning details icon and number of buckets. Use these fields for manually defining categories for the data.
 - **Use for List Generation:** Use to add or remove columns to be included in the list generated from the scoring run results.
 - **List Generation:** The mapping of the data source field to a corresponding list generation column.
6. Repeat for each field in the data source object.
7. Select Update to save changes.

5.6.3 Creating User-Defined Data Sources

Instead of modifying a seeded data source, you can create user-defined data sources and targets. This enables you to further customize data used for data mining.

Two types of external files can be loaded into the database export files and flat files. If loading an export file use the database import utility. If loading flat files, use SQL*Loader.

- For more information on performing import and export see *Oracle9i Database Utilities Release 2 (9.2)*.
- For more information on SQL* Loader see *Oracle9i Database Administrator's Guide Release 2 (9.2)*.

All tables or views used for defining a user-defined data source must be referenced by the APPS schema, without requiring a schema name qualifier. For example, "datamart.customer_data" is not selectable from the data source creation screen. Either a synonym or a view can be created in the APPS schema to reference the external source, and it can be named "datamart_customer_data".

When creating user-defined data sources and fetching data across the network through a database link (not recommended), you will create a database link in the APPS schema which links up to the datamart with the data to be used for defining a data source. Then, a synonym must be created in the APPS schema that references the table at the database link, typically, data_table@database_link.

This implementation is not recommended as network traffic from selecting a large table can slow down the infrastructure and cause performance problems.

To understand and set up user-defined data sources use the following procedure:

- [Section 5.6.3.1, "Retrieving Data from a Non-Applications Table and Schema"](#)
- [Section 5.6.3.2, "Selecting Primary Keys for User-Defined Data Sources"](#)
- [Section 5.6.3.3, "Implementing User-Defined Data Sources"](#)

5.6.3.1 Retrieving Data from a Non-Applications Table and Schema

If the table is owned by a schema that is not an Applications schema, SELECT privileges must be granted to the APPS schema from the source schema. A synonym must be created in the APPS schema to reference the table in the non-Applications schema.

5.6.3.2 Selecting Primary Keys for User-Defined Data Sources

The selected table or view must contain a primary key or a unique key consisting of a single column. Composite keys are not supported. The selector for the primary key does not filter the columns based on uniqueness or that it is a primary key. No Applications table has a primary key defined, but each standard table has a unique key that has behaviors of a primary key.

5.6.3.3 Implementing User-Defined Data Sources

To create your own data source, use the following procedure:

Prerequisites

None

Steps

- 1. Log in to Oracle Marketing.
- 2. Navigate to Administration > Marketing > Analytics > Data Source.
- 3. Select Create.
- 4. Object Name: Choose a name for the object.
Use the search and select flashlight icon to select an object. In this step, you are selecting the database table or view that is serving as the data source. The data mining Administrator must have access to all tables and views in the database.
- 5. Primary Key: Select a primary key for this data source.
Use the search and select flashlight icon to select the primary key. In this step, you are selecting the column in the table or view previously selected. This key serves as the unique identifier for the data in this source.

Figure 5–2 Create Data Source

Create Data Source

Specify the required information to create a new Data Source.

CreateClear

*NameFowler Test

*CodeFO1414

*Object NameAMS_PERSONS_V

🔍

*Primary KeyPERSON_ID

🔍

DescriptionMarketing Persons view (for table AMS_PERSONS), unique identifier is Person ID.

* indicates required field

CreateClear

6. Select Create.
The Data Source Details page opens.
7. Validate that the Use for Data Mining Column is checked.
8. Validate Source Field name.
9. Optionally change the Source Field Label.
10. If you want the application to automatically bin the data, select Auto-binning.
11. If you want to manually bin the data, select the Binning Detail icon.
12. If manually binning the data, enter a numeric value in the Number of Buckets Column.
13. If generating a list from the data mining results, check the Use for List Generation Column.
14. If using List Generation, select a list Generation Column.
15. Select Update to save your work.

5.6.4 Creating Targets

When a marketer creates a predictive model they will select a data source and a target. The *data source* is the mapped table and the *target* is the mapped field in the table. Because each target (field) is associated with a specific data source (table), selecting the target automatically selects the data source.

For example, as the Marketing Administrator, you might define a target called “Oracle 10k Fun Run Event” mapped to a specific user-defined data source called “Marketing Events”. This could be a predictive model to predict who might participate in this event.

Oracle Marketing currently supports binary outcomes for the target field. As such, the possible value for a target field must either be binary or must be mapped to a binary outcome. For example, if the value for a field can be an income, and you are interested in high income households, then values equal to or exceeding \$100,000 could be mapped to 1 (yes), and values under \$100,000 could be mapped to 0 (no). As they System Administrator will need to know the attributes present in your customer models.

To create a Target use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Analytics > Targets.
3. Select Create.
The Create Target page opens.
4. Enter the following information:
 - **Name:** Enter a name for the target. Use a name that is logical to the customer behavior being predicted.
 - **Model Type:** Using the LOV select either Custom, Direct Mail Response, E-mail response, Loyalty/Retention, Telemarketing Response.
 - **Data Source:** Using the LOV select a data source. This is the table in which the target belongs.
 - **Target Field:** Select the flashlight icon to launch the target field selector. Using this selecting choose a source field for the target.
 - **Description:** Optionally enter a description.
5. In the Positive Target Values section specify a range for the target.
 - **Condition:** Use this column to select a condition operator for your target.
 - **Value:** Use this column to indicate a value for the condition selected. Certain conditions allow certain value input. For example, if the condition “=” is selected, for the target “marital status”, then an appropriate value could be “married”. The text Input is case sensitive and must match the value in the database exactly. For example, if the value “married” is stored in the database as “MARRIED” then the text input “married” will not be recognized.
 - **Upper Value:** Use this column to indicate a value for the operator selected. Only the BETWEEN operator will work with this option. For example, if using the target “household income” and the operator “BETWEEN”, then upper value could be “150000”. In this example, the Value field would indicate the lower value “100000”, this would consider all household

incomes between 100000 and 150000 to be positive target values. All other incomes are considered negative values. A valid model must contain both positive and negative target values. Without having both, the model will not build.

- **Value Description:** Use this column to give your values a text description.

6. Select Create.

5.7 Data Mining Customer Attributes

The table below lists the customer attributes used by Oracle Marketing to build predictive models. On average, if more attributes are populated in the database, Oracle Marketing has a higher likelihood of producing accurate modeling results.

Table 5–5 Data Mining Customer Attributes

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
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

Table 5–5 Data Mining Customer Attributes

No.	Attribute Name	Description	Source	Target Audience
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
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

Table 5–5 Data Mining Customer Attributes

No.	Attribute Name	Description	Source	Target Audience
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
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

Table 5–5 Data Mining Customer Attributes

No.	Attribute Name	Description	Source	Target Audience
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
39	Paydex Score per Year	Paydex score for the last year	HZ_ORGANIZATION_ PROFILES. PAYDEX_SCORE	Organization Contacts

Table 5–5 Data Mining Customer Attributes

No.	Attribute Name	Description	Source	Target Audience
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
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

Table 5–5 Data Mining Customer Attributes

No.	Attribute Name	Description	Source	Target Audience
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

Table 5–5 Data Mining Customer Attributes

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

Table 5–5 Data Mining Customer Attributes

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

Table 5–5 Data Mining Customer Attributes

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

Table 5–5 Data Mining Customer Attributes

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

Table 5–5 Data Mining Customer Attributes

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

Table 5–5 Data Mining Customer Attributes

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

Table 5–5 Data Mining Customer Attributes

No.	Attribute Name	Description	Source	Target Audience
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
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

Table 5–5 Data Mining Customer Attributes

No.	Attribute Name	Description	Source	Target Audience
119	Returns by Value	Monetary value of returns	BIC_PARTY_SUMM. RETURN_BY_VALUE	Both Persons and Organization Contacts
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

Table 5–5 Data Mining Customer Attributes

No.	Attribute Name	Description	Source	Target Audience
128	Number Inactive Contracts	Total number of contracts inactivated	BIC_PARTY_SUMM. INACTIVE_CONTRACTS	Both Persons and Organization Contacts
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

Table 5–5 Data Mining Customer Attributes

No.	Attribute Name	Description	Source	Target Audience
137	Number of Open Service Requests	Total number of open service requests	BIC_PARTY_SUMM. OPEN_SRS	Both Persons and Organization Contacts
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. REFERRALS	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

Table 5–5 Data Mining Customer Attributes

No.	Attribute Name	Description	Source	Target Audience
146	Average Hold Time	Average hold time	BIC_PARTY_SUMM. AVG_HOLD_TIME	Both Persons and Organization Contacts
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

Implementing Trade Management

This chapter includes implementation and administration tasks for the Trade Management module of Oracle Marketing. Trade Management is an optional component of an overall Oracle Marketing implementation.

Topics include:

- [Section 6.1, "Trade Management Overview"](#)
- [Section 6.2, "Oracle Trade Management Implementation Process Overview"](#)
- [Section 6.3, "Implementation and Administrative Task Overview"](#)
- [Section 6.4, "Implementing Mandatory Dependencies"](#)
- [Section 6.5, "Implementing Claims"](#)
- [Section 6.6, "Administering Claims"](#)
- [Section 6.7, "Implementing Budgets"](#)
- [Section 6.8, "Administering Budgets"](#)
- [Section 6.9, "Implementing Offers"](#)
- [Section 6.10, "Administering Offers"](#)

6.1 Trade Management Overview

Trade Management (TM) provides an integrated solution addressing three functional areas critical to B2B interactions:

- **Promotional planning and execution:** Enables manufacturers to improve their management of trade spending. This ensures optimal effect and impact of promotional executions.
- **Budget management:** Efficient and cohesive budgeting and financial processing. This eliminates wasteful spending and ensures trade funding is allocated and being utilized as intended.
- **Deduction management:** Reduces and controls short-payment problems.

TM empowers many areas of a manufacturer's business to operate more effectively by providing closed-loop planning and execution. TM further enables manufacturers to optimize the impact of marketing, sales, co-op, and trade promotions campaigns across the entire demand chain. TM measurably improves the return on investment for B2B interactions.

TM functionality is grouped into three functional categories:

- Claims
- Budgets
- Offers/Trade Planning

TM is tightly integrated with:

- Accounts Receivables
- Accounts Payable
- Order Management
- General Ledger
- Advanced Pricing

6.1.1 Benefits of Implementing Trade Management

Business benefits of a TM implementation:

- Targeted funds specific to a product, region, channel, geography, or customer.
- Tracking fund balances.

- Up to date, accurate, and precise information enables the sales force to make fact-based decisions.
- Promotion planning, execution, and evaluation improves account profitability.
- Reduced invoice errors minimizes deductions and associated costs.
- Coordinated consumer campaign messages (B2B and B2C).
- Automated claims and deduction settlement.
- Identification and collection of invalid claims.
- Proactive deduction prevention.

6.1.2 Claim Management Overview

TM enables users to manage processes required for claim reconciliation, deductions or overpayments. Using TM, research, validation, and claims settlement is possible.

Claims Management Key Features:

- **Auto-Resolution:** Enables resolution of deductions and overpayments. When a deduction or overpayment is recognized, AR automatically creates a deduction/overpayment in TM.
- **Contra Charge Settlement:** Enables offsetting AR and Accounts Payable balances.
- **Claims Management:** Claims created in TM are associated to promotional accruals, settled automatically by check, credit memo or RMA.
- **Autopay:** When settling autopay claims, TM integrates with ERP financial applications for settlement. TM integrates with GL to provide accounting entries for promotional accruals.
- **Discoverer Tool:** Used as a research tool, promotional accrual information is displayed providing valuable views, such as a customer's 360 view and a Claims Aging view.

6.1.3 Budget Management Overview

TM's budget management functionality provides a central repository for sales, marketing and partnering fund usage. This assists a company in maintaining control over spending.

Budget Management Key Features:

- **Order Channel Integration:** Using the Funds Accrual Engine, all offer adjustments and accrual information (from all ordering channels) is retrieved. The order channel could be Order Management, iStore or Quoting - in all cases, it is passed to TM.
- **Accrual Management and General Ledger Integration:** After the Funds Accrual Engine retrieves order information, it further handles manual adjustments by automatically calculating changes to accruals based on:
 - Return order
 - Changes to volume rebate offer
 - Accruals based on cumulative sales volume changes
 - Spreading of lump sum offer accruals
 - Scan data promotion accrual changes
- **Top Down Bottom Up Budgeting:** Budget allocated to various users (within a territory hierarchy) is based on the territory's historical sales data. These users can submit feedback or negotiate a different allocation during the budgeting process.

6.1.4 Offer and Trade Planning Functionality

Trade planning enables a user to create, plan, and execute promotional deals (also known as Offers). Trade planning provides trade professionals with the necessary tools to enable fact-based decision making. With a well informed business rationale, trade strategies can be precisely executed for promotional activities.

Offers and Trade Planning Key Features:

- **Campaign Versioning:** Enables companies to compare and analyze campaigns prior to executing them.
- **Manufacturer ROI Calendar:** Enables companies to forecast customer demand.
- **Product Creation:** Inventory access enables product and product bundle creation.
- **Offer discounts:** Enables targeted offers for customers and products.
- **Offers and Campaign Association:** Enables companies to coordinate offers with marketing campaigns.

- **Applying Offers Automatically:** Enables companies to automatically give customers order discounts - ultimately minimizing pricing disputes.
- **Order and Promotion Updates:** Enables companies to record sales orders and promotional expenses into the budget, enabling a real-time view of the market.

6.2 Oracle Trade Management Implementation Process Overview

TM implementation leverages many common setups performed during the basic Oracle Marketing implementation described in [Chapter 3, "Implementing Oracle Marketing"](#). To ensure that your organization can fully utilize TM budget, offer, and claim functionality, you will be instructed to verify some of the basic Oracle Marketing implementation. Additional tasks for previously implemented components must also be performed.

Two general types of tasks must be performed:

- **Implementation tasks:** One-time tasks performed during or shortly after installation. Examples include setting profile options, creating and verifying lookup values, and creating users.
- **Administrative tasks:** Repetitive tasks performed post-installation. Examples include creating claim types and reasons, configuring budget threshold, and creating custom setups.

As you follow the implementation procedures, you will notice that some tasks are required while others are optional.

6.3 Implementation and Administrative Task Overview

The following table lists the implementation and administrative tasks for TM.

Table 6–1 Implementation and Administrative Task Overview

Task Name	Task Type	Requirement	Description
Implementing Mandatory Dependencies	Implementation	Required	See Section 6.4, "Implementing Mandatory Dependencies"
Implementing Claims	Implementation	Required	See Section 6.5, "Implementing Claims"
Administering Claims	Administrative	Required	See Section 6.6, "Administering Claims"
Implementing Budgets	Implementation	Required	See Section 6.7, "Implementing Budgets"

Table 6–1 Implementation and Administrative Task Overview

Task Name	Task Type	Requirement	Description
Administering Budgets	Administrative	Required	See Section 6.8, "Administering Budgets"
Implementing Offers and Trade Planning	Implementation	Required	See Section 6.9, "Implementing Offers"
Administering Trade Planning and Offers	Administrative	Required	See Section 6.10, "Administering Offers"

6.4 Implementing Mandatory Dependencies

The following dependencies must be implemented for Trade Management:

- [Section 6.4.1, "Creating the Trade Management User"](#)
- [Section 6.4.2, "Setting Up Oracle Receivables for Trade Management"](#)
- [Section 6.4.3, "Setting Up Oracle Payables for Trade Management"](#)
- [Section 6.4.4, "Setting Up General Ledger for Trade Management"](#)
- [Section 6.4.5, "Setting Up Territory Manager for Trade Management"](#)
- [Section 6.4.6, "Setting Up Advanced Pricing for Trade Management"](#)
- [Section 6.4.7, "Setting Up Oracle Order Management"](#)
- [Section 6.4.8, "Verifying the Oracle Marketing Implementation"](#)
- [Section 6.4.9, "Implementing the Account Generator"](#)
- [Section 6.4.11, "Setting Up Buying Groups"](#)
- [Section 6.6.1, "Setting Up System Parameters Defaults for Claims"](#)

6.4.1 Creating the Trade Management User

A TM user is created in the same manner as any other CRM application user. Two procedures are presented below:

- [Section 6.4.1.1, "Creating a Trade Management User"](#)
- [Section 6.4.1.2, "Creating Custom Responsibilities"](#)

Use the seeded *Oracle Marketing Super User* responsibility for Trade Management. This responsibility gives the user access to both basic Marketing functions (core) and Trade Management. To restrict user access to TM functionality, create a custom responsibility.

6.4.1.1 Creating a Trade Management User

To create a user for TM use the following high-level procedure:

1. Create an employee in Human Resources.
2. Create a user ID.
3. Assign the employee to the user ID.

During this task, assign Trade Management responsibilities to the user.

4. Import the employee as a Resource.

For a more detailed procedure, see [Section 2.11, "Creating Users"](#).

6.4.1.2 Creating Custom Responsibilities

To create a custom responsibility use the following high-level procedure:

1. Create the menu structure.
2. Create the new responsibility.
3. Assign the menu to the new responsibility.

For specific procedures on creating a custom responsibility, refer to the *Oracle Applications System Administrator's Guide*.

A sample menu structure for a custom TM responsibility is provided in the following table:

Table 6–2 Sample Trade Management Custom Responsibility Menu Structure

Prompt	Submenu	Function
Home	ASF_HOME	Not applicable
Product	Oracle Marketing New Product Menu	Product Overview
Offers	OMO Offers Cue Card Menu	AMS_OFFR_OVER
Budget	AMS_NEW_BUDGETS_MENU	OMO Budget Overview
Claim	AMS_NEW_CLAIMS_MENU	OMO Claim Overview
Administration	Marketing admin menu for 11.5.9 & beyond	Not applicable

6.4.2 Setting Up Oracle Receivables for Trade Management

Trade Management tightly integrates with Oracle Receivables (AR) to manage deduction and overpayment claims.

To set up AR for Trade Management, follow the procedures listed in these sections:

- [Section 6.4.2.1, "Setting Up the Workflow Notification for Claims Settlement"](#)
- [Section 6.4.2.2, "Verifying Line Transaction Flexfields"](#)
- [Section 6.4.2.3, "Creating a Transaction Source for Claim-related Credit and Debit Memos"](#)
- [Section 6.4.2.4, "Creating an Aging Bucket for Claims and Deductions"](#)
- [Section 6.4.2.5, "Attaching Trade Management Requests"](#)
- [Section 6.4.2.6, "Setting Up Related Customer Accounts"](#)
- [Section 6.4.2.7, "Setting Up Receivable Activity for Trade Management"](#)

6.4.2.1 Setting Up the Workflow Notification for Claims Settlement

After a deduction or overpayment is created in AR, it is passed to TM. The claim owner manages, researches, and settles the deduction or overpayment. The majority of settlement methods integrated with AR are automated, either through real-time API calls or through Autoinvoice programs. Settlement automation can be disabled by turning off the following profiles:

- AMS : Automate Deduction/Overpayment Settlement
- AMS : Automate RMA Settlement

The following settlement methods are supported:

- Credit memo
- Chargeback
- Write-off
- Debit memo
- On account cash
- RMA

To create Workflow notifications for claim settlement, use the following procedure.

Prerequisites

A valid AR responsibility exists.

Steps

1. Open Workflow Builder.
2. Open AMS: Claims Settlement from the database.
3. Select File > Load Roles from database.
4. Enter the appropriate Receivables responsibility in Find Roles and perform a query.
5. Select the desired Receivables role from the query results and add it to the loaded roles.
6. Click OK.
7. Expand Item Type and Attribute for AMS: Claims Settlement.
8. Double-click attribute Receivable Role.
9. Open the Value drop-down list in the default section, and assign the appropriate Receivables responsibility to this attribute.
10. Save your work.

6.4.2.2 Verifying Line Transaction Flexfields

TM passes the claim settlement method information to AR using the AR line transaction flexfields. To verify that the line transaction flexfield content has been properly set up, use the following procedure.

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Application > Flexfields > Descriptive > Segments.
3. In the Application field, type Oracle Receivables.
4. In the Title field, type Line Transaction Flexfield.

5. Choose `Ctrl + F11` to perform a query.
6. In the Context Field Values table, under the Code column, place your cursor in the CLAIM field.
7. Click Compile.
8. Click OK.

6.4.2.3 Creating a Transaction Source for Claim-related Credit and Debit Memos

The settlement of a claim in TM can result in the creation of a debit or credit memo by the Autoinvoice program in AR. This program uses a transaction source to determine how acceptance and validation data is passed to the Autoinvoice interface tables. As such, a transaction source is required to create debit and credit memos in AR.

Use the following guidelines for creating transaction sources:

- Type Field: Select Imported
- Batch Source Tab: For the Reference Field Default Value field, select `interface_header_attribute1` as the value
- Autoinvoice Options: Accept the defaults
- Customer Information Tab: Choose ID for all options
- Accounting Information Tab: Choose ID or Percent for all options
- Other Information Tab: Choose ID or Code for all options
- Sales Credit Data Validation Tabs: Choose ID or Percent for all options

6.4.2.4 Creating an Aging Bucket for Claims and Deductions

The Claims Aging View summarizes all claim amounts by customer and days due. The claims processor can use this view to determine which customer has the largest number of outstanding claims and work on those claims first.

An aging bucket can be configured in AR and used by TM to review and report open claims. It is defined by a specific time period. Each aging bucket can have multiple bucket lines (time periods):

- **Current:** Ages the claims outstanding or not yet resolved based on the Claim date. For example, by specifying 0 to 10 days old, claims that are 0 to 10 days past the claim date are displayed.

- **Past Due:** Ages 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, by specifying 10 to 20 days due, claims that are 10 to 20 days past the past due date are displayed.
- **Future:** Ages claims that are due in the future. Note that the aging analysis is based on the due date specified on the claim. For example, specifying -10 days to -5 days displays claims that will become past due 5 to 10 days from the current date.

For detailed procedures on setting up Aging Buckets, refer to Chapter 2 of *Oracle Receivables User Guide*.

Once you set up an aging bucket for TM, run the concurrent request **AMS-TM: Claims Aging Populating**. This program asks for a parameter - the list of values for this parameter consists of all the aging buckets defined in AR. Select the aging bucket you have set up for Trade Management.

6.4.2.5 Attaching Trade Management Requests

As an option, you can add TM concurrent requests to the AR user responsibility. This procedure enables claim-related requests to be run by an individual with the AR user responsibility.

Alternatively, all Trade Management requests can be found under the Oracle Marketing Administrator responsibility.

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator Responsibility.
2. Navigate to Security > Responsibility > Request.
3. Query for Group = Receivables All.
4. Under the Request table, add any program used by Trade Management.
5. Save your work.

6.4.2.6 Setting Up Related Customer Accounts

Claims can be settled for the claiming customer account and all other related accounts. Claims always uses customer accounts in TCA, not parties. For example,

if accruals were tracked at the account level, and the claim is from the bill-to account, payments can be made to other related ship-to accounts.

To define account relationships, use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with Accounts Receivable Responsibility.
2. Navigate to Customers > Standard.
3. Query for and select the customer for which you want to add account relationships.
4. Open the Customer Standard form.
5. Verify that this is a proper customer account.
To verify, look at the customer number. If this is a party only, the field will be blank.
6. Navigate to Relationships.
7. Using the Related Customers Table, select the accounts you want to designate as related accounts.

6.4.2.7 Setting Up Receivable Activity for Trade Management

In AR, deductions and overpayments can be passed to TM.

Two types of deductions exist:

- **Transaction-related:** Can be referenced back to a specific transaction such as an invoice, debit memo, or chargeback. During the cash application process, the balance of the transaction is left on the transaction itself.
- **Non-transaction related:** Cannot be referenced back to a specific transaction. When remittance is made, the customer may indicate that all transactions are being paid in full. In addition, they submit a separate debit memo, thus causing a deduction.

Claims assumes that the transactions themselves are paid in full. In reality, however, the cash amount received may be less than the actual balance. This difference must be accounted for.

Consider the case where a debit memo is used. A customer remits a cash payment for \$1,000 when the invoice total is \$1,200, and indicates that payment has been made in full. On a separate line of the invoice, reference is made to an internal debit memo number and a deduction of \$200. The accounting entry will be:

- Debit Cash \$1,000
- Debit GL account set up in the Receivable Activity \$200
- Credit Receivables \$1,200

Overpayment claims are always non-transaction related. All non-transaction related claims require an AR activity.

To create an AR activity, use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with Accounts Receivable Responsibility.
2. Navigate to Setup > Receipts > Receivable Activities.
3. Enter a Name.
4. Enter a Description.
5. Select Type = Claim Investigation.
6. Accept the defaults for GL Account Source and Tax Code Source.
7. Select the GL account that will hold the amount of a non transaction-related claim while it is being investigated by Trade Management users.
8. Save your work.

6.4.3 Setting Up Oracle Payables for Trade Management

Bill back requests are entered in TM as claims. Claims can be associated with promotional earnings and accruals. They can be settled by check, credit memo or RMA (which creates a credit memo). When the customer is paid by check, TM uses Open Interface Import in Oracle Payables (AP) to create a payables invoice. The invoice is then converted to a check.

To implement AP for Trade Management, follow the procedures in these sections:

- [Section 6.4.3.1, "Creating a Source for Invoices"](#)
- [Section 6.4.3.2, "Verifying Payment Terms"](#)

6.4.3.1 Creating a Source for Invoices

When settling a claim with a check, TM populates the AP invoice interface tables with the payables invoice details. A *source* is required for this. For additional information, refer to the *Oracle Payables User Guide*.

To create a source to identify AP invoices generated by TM, use the following procedure.

Prerequisites

None

Steps

1. Log in to Oracle Forms with Accounts Payable Responsibility.
2. Navigate to Setup > Lookups > Payables.
3. Query for Type = SOURCE.
4. Add the Source code to be used by TM.
5. Save your work.

6.4.3.2 Verifying Payment Terms

When settling a claim with a check, TM populates the AP invoice interface tables with payables invoice details. Once created in AP, an AP payment term can be selected in the system parameters for AMS. While populating the AP invoice interface tables, TM passes this payment term to create the invoice.

For more details, refer to the *Oracle Payables User Guide*.

To verify AP payment term set ups, use the following procedure.

Prerequisites

None

Steps

1. Log in to Oracle Forms with Accounts Payable Responsibility.

2. Navigate to Setup > Invoice > Payment Terms.
3. Review the Payment Terms you intend to pass from TM to AP.
4. Save your work.

6.4.4 Setting Up General Ledger for Trade Management

Several TM offers types can result in the creation of accruals (for example, Accrual, Lumpsum, Scan Data and Volume Offers). Accruals are tracked in General Ledger (GL). Additionally, accrual adjustments can also be tracked in GL. When GL is implemented for TM, the GL related flags in the system parameters cue card for AMS is visible.

When accruals occur, TM creates the following account entries:

- Debit Sales or Expense Account
- Credit Liability Account

When negative adjustments are made to accruals, TM creates the following reversal entries:

- Debit Liability Account
- Credit Sales or Expense Account

When a claim or deduction is associated with promotional accruals or earnings, and the claim is being settled with a credit memo, TM:

- Creates the following accounting entries:
 - Debit Liability Account
 - Credit Receivables Clearing Account
- Passes the Receivables Clearing Account to AR

When a claim or deduction is associated with promotional accruals/earnings, and the claim is being settled with a check, TM:

- Creates the following accounting entries:
 - Debit Liability Account
 - Credit Vendor Clearing Account
- Passes the Vendor Clearing Account to AP

To implement GL for Trade Management, perform the procedures in the following sections:

- [Section 6.4.4.1, "Setting Up GL Accounts"](#)
- [Section 6.4.4.2, "Verifying Journal Source"](#)
- [Section 6.4.4.3, "Verifying Journal Categories for Trade Management"](#)

6.4.4.1 Setting Up GL Accounts

For TM purposes, create the following GL accounts:

- Sales Expense
- Accrual Liability
- Receivables Clearing
- Vendor Clearing

Once created, these accounts can be assigned in the System Parameters for AMS and Claim Type setups. Refer to the *Oracle General Ledger User's Guide* for more information.

6.4.4.2 Verifying Journal Source

After TM creates accounting entries, they are first posted to the AMS interface table. To transfer these accounting entries to the GL interface table, use the concurrent program AMS-TM : Transfer to General Ledger.

Out-of-the-box, journal entries generated by TM are identified by a GL source called Marketing. For more details on General Ledger Sourcing, refer to the *Oracle General Ledger User's Guide*.

To verify the Marketing source, use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with General Ledger Responsibility.
2. Navigate to Setup > Journal > Sources.
3. Query for Source = Marketing.
4. Verify that the Import Journal References flag is checked.

5. Verify the Freeze Journals and Require Journal Approval flags.
6. Verify the Effective Date Rule.

6.4.4.3 Verifying Journal Categories for Trade Management

The journal entries created by TM can further be identified using GL Journal Categories. TM uses the following categories:

- **Fixed budgets:** Used for entries created when offers sourced from fixed budgets generate accruals.
- **Accrual budgets:** Used for entries created when fully accrued budgets generate accruals.
- **Settlements:** Used for entries created when promotional claims or deductions are settled.

To verify category setups, use the following procedure.

Prerequisites

None

Steps

1. Log in to Oracle Forms with General Ledger Responsibility.
2. Navigate to Setup > Journal > Categories.
3. Query the Trade Management Categories (verify that it exists).

6.4.5 Setting Up Territory Manager for Trade Management

TM uses territories for two purposes:

- **Budget Allocation:** For fixed budget allocation and fully accrued budgets. Transaction Type = Offer in Territory Manager.
- **Claim Owner Assignment:** For transaction types analogous to the Claim in Territory Manager.

As such, the concept of winning territory in other applications equates to budget and claim owner assignment in TM. To implement Territory Manager for Trade Management, perform the procedures in the following sections in the order they are presented:

- [Section 6.4.5.1, "Setting Up Territory Types"](#)
- [Section 6.4.5.2, "Setting Up Territories for Budgets"](#)
- [Section 6.4.5.3, "Setting Up Territories for Claim Owner Assignment"](#)
- [Section 6.4.5.4, "Running Concurrent Processes"](#)

6.4.5.1 Setting Up Territory Types

Setting up territory types is mandatory for TM budgets, but optional for claim owner assignment. It is the first task you must perform when setting up Territory Manager for TM. Territory types map to a specific level in a Trade Management budget. Each level in the territory hierarchy must have a unique territory type. For more details on Territory Manager, refer to the *Oracle CRM Foundation User and Implementation Guide*.

To create territory types, use the following procedure.

Prerequisites

None

Steps

1. Log in to Oracle Forms with the CRM Administrator Responsibility.
2. Navigate to Territory Manager > Territory Administration.
3. Using the Navigator panel select View By = Territory Types.
4. Select Oracle Trade Management.
5. Right-click Oracle Trade Management.

Territory types do not need to be arranged in any hierarchy, so always right-click Oracle Trade Management instead of an existing territory type.

6. Select New.
7. Enter a Name for the territory.
8. Optional. Enter a Description.
9. Enter a Transaction Type.

Transaction types for TM are Claims or Offer. What you select here determines the list of values available in the Transaction Qualifiers table.

10. In the Transaction Qualifiers table, select the qualifiers you want associated with the territory type.

For example, if using the territory type Region, you may want to include the qualifiers state and country. Once selected, these qualifiers are available when you create a territory using this territory type.

11. Save your work.

To continue creating territory types, place your cursor on the Name field, and click the + icon.

6.4.5.2 Setting Up Territories for Budgets

Fixed budgets and fully accrued budgets use territories in the following ways:

- **Fixed budgets:** Fixed budgets use territories for allocation purposes, thus enabling a company to allocate money to each sales territory. Fixed budgets are allocated down a particular territory hierarchy. When the allocation is complete, a budget hierarchy mimicking the territory hierarchy is created. The primary resource for each territory is the budget owner. Other territory resources become team members of the budget.
- **Fully accrued budgets:** Fully accrued budgets use territories to create budget hierarchies. These budgets can be created based on a specific territory hierarchy. When approved, a budget hierarchy mapped to the selected territory hierarchy is created. Each child node (at the lowest level of the budget) is created using an Advanced Pricing modifier. When an order that meets the defined criteria is placed, the appropriate child budget total or utilized amount is increased. The primary resource for each territory is the budget owner. Other territory resources become team members of the budget.

For more specific details on Territory Manager, refer to the *Oracle CRM Foundation User Guide and Implementation Guide*.

To create Territories, use the following procedure.

Prerequisites

Territory types must be set up. See [Section 6.4.5.1, "Setting Up Territory Types"](#).

Steps

1. Log in to Oracle Forms with the CRM Administrator Responsibility.
2. Navigate to Territory Manager > Territory Administration.

3. On the Navigator panel, select View By = Territories.
4. Select Oracle Trade Management.
5. Begin building the Territory hierarchy as follows:

Note: The easiest way to build the hierarchy is to build it from the top-down. When you right-click an existing territory and select New, you create a child territory. If you right-click Oracle Trade Management, you are defining a root territory which by default has a parent called Catch All.

- a. Enter a Name for your territory

- b. Enter a Type.

The type is mandatory for a territory to be used for budget allocation.

Transaction types default to Claim and Offer as set up in the territory type.

- c. Click the Transaction Qualifiers tab.

- d. Verify your Qualifiers for this territory.

Qualifiers define the territory. After budget allocation, if any offers require funding, and Budget-Offer Validation is turned on, these qualifiers are used during the validation.

The validation determines whether an offer is eligible for funding by comparing its market, customer and product selections to the market and eligible product specifications for the budget.

For example, you enter the qualifier California for a territory. After budget allocation, a sub-budget is allocated for this territory. If an offer created for a customer in New York requests funding from the California territory budget, Budget-Offer Validation will fail and the request will be denied. This validation ensures that money set aside for certain customers and products are used specifically for those customers and products only.

Child territories by definition inherit the qualifiers from their parent. View them by clicking the Show Inherited Qualifiers button.

- e. Optional. To search for the right resources based on their Human Resource records such as competence, language, and job title, select the Resource Qualifiers tab.

- f. Select the Resources tab.
- g. Search for the name of the resource that you want to add to this territory.
- h. If you check the Primary Contact flag for a particular resource, then that person is designated as the budget owner.

Resources not flagged as primary contacts become team members for the budget. The sub-budget owner is the primary contact for the territory.

For example, you have a territory called US West, whose parent is United States. It is managed by a regional sales manager John. There are two other sales representatives in this territory, Mary and Bob. When creating the US West territory, you flag John as the primary contact. When you allocate a budget down the United States territory hierarchy, a sub-budget is created for US West with John as its owner. Mary and Bob are added to the US West budget team and can view the budget.

- 6. Save your work.
- 7. To continue defining sub-territories below the current territory, select the sub-territories tab.

6.4.5.3 Setting Up Territories for Claim Owner Assignment

Claim owner assignment works much like how territories are used in other applications. For example, claim territory AZS can be set up so that if the claiming customer is Business World, the claim is assigned to John. Other AZS territory resources are assigned as team members to the claim. Territory A is the “winning” territory.

For more details on Territory Manager, refer to the *Oracle CRM Foundation User and Implementation Guide*.

Prerequisites

None

Steps

- 1. Log in to Oracle Forms with CRM Administrator Responsibility.
- 2. Navigate to Territory Manager > Territory Administration.
- 3. On the Navigator panel select View By = Territories.
- 4. Select Oracle Trade Management

5. Enter a Name for the Territory.

Note: For claim owner assignment, no complex hierarchies need to be set up. All the claim territories can be created on the same level without a hierarchy.

Transaction types default to Claim and Offer as set up in the territory type.

6. Ignore the Number of Winners field.

7. Enter a Rank.

Rank determines the order by which a territory is evaluated.

8. Click the Transaction Qualifiers tab.

Verify your qualifiers for this territory. Qualifiers define the territory. Child territories by definition inherit the qualifiers from their parent. View them by clicking the Show Inherited Qualifiers button.

9. Optional. Click the Resource Qualifiers tab.

Resource Qualifiers can help you search for the right resources based on their Human Resources records such as competence, language, job title, etc.

10. Select the Resources tab.

11. Search for the resource name you want to add to this territory.

If you check the Primary Contact flag for a particular resource, then that person becomes the claim owner. Resources not flagged as the primary contacts become a team members for the claim. Claim team members differ from budget team members in that claim team members can update claims. Budget team members can only view their budgets, unless designated otherwise by the budget owner.

12. Save your work.

13. To continue defining sub-territories below the current territory, click the Sub-Territories tab and the New Sub-Territory button.

6.4.5.4 Running Concurrent Processes

Each time you change a territory definition, you must run the following concurrent programs:

- **In Territory Manager:** Generate Territory Package
- **In Trade Management:** AMS-TM: Import Territory Hierarchy

When running the AMS-TM: Import Territory Hierarchy program, you are prompted for a Territory Hierarchy Start Node. This value will be any root territory defined under Oracle TM in Territory Manager.

For more details on Territory Manager, refer to the *Oracle CRM Foundation User and Implementation Guide*.

6.4.6 Setting Up Advanced Pricing for Trade Management

Advanced Pricing (QP) provides the following functionality for TM:

- Provides promotion (offer) logic
- Price lists created in TM are stored in the QP schema
- Offers created in TM are stored in the QP schema

When an offer or price list is created in TM, a call to the Advanced Pricing APIs is made.

To implement Advanced Pricing for TM, perform the procedures in the following sections:

- [Section 6.4.6.1, "Setting Advanced Pricing Profiles"](#)
- [Section 6.4.6.2, "Setting Promotional Limits"](#)

6.4.6.1 Setting Advanced Pricing Profiles

TM offers are created in QP as modifiers of type Promotion. A QP user can modify offers from within QP, as determined by the profile option **QP: Source System Code** set at either the site, application or user level.

For TM, this profile option can be set to Oracle Pricing or Oracle Marketing.

- **If set to Oracle Pricing:** A QP user is able to edit TM offers.
- **If set to Oracle Marketing:** QP user is unable to edit TM offers.

Because offers typically go through an approval process, we recommend setting this profile to Oracle Pricing.

For more details on Advanced Pricing, refer to the *Oracle Advanced Pricing User Guide* and *Oracle Advanced Pricing Implementation Guide*.

6.4.6.2 Setting Promotional Limits

When creating offers, TM users can define a promotional limit, referred to as a cap. To enable promotional limits, set the following profile options:

- Set **QP: Promotion** to Yes at the site level. This profile enables the promotional limit feature.
- Set **QP: Limit Exceed Action**, at site, responsibility, or user levels. For this profile select one of the following settings:
 - **Soft - Full Benefit Amount:** Sends the OM user a warning message when promotional limits are being violated. Although the warning appears, the order process can proceed.
 - **Hard - Adjust Benefit Amount:** Puts the order on hold when promotional limits are violated.

These settings enable the actual limit amount of each offer to have a cap amount. This amount is passed by TM to QP and OM as the promotional limit.

For more details, refer to the *Oracle Order Management Suite Implementation Guide* and *Oracle Advanced Pricing Implementation Guide*.

6.4.7 Setting Up Oracle Order Management

TM integrates with Order Management (OM) for the following purposes:

- **Advanced Pricing - Order Management:** TM offers are passed directly into the QP schema. Although they reside in the QP schema, they are executed in OM. For this integration point, no OM setups are necessary.
- **Order Management - Trade Management Budgets:** Once an offer is applied to a sales order, an off-invoice discount or accrual adjustment is created for the order. AMS Funds Accrual Engine fetches the order (and the related offer adjustment information), ultimately updating the budget utilized column. For this integration point, no OM setups are necessary.
- **Trade Management Claims - Order Management:** When customers return products (for any reason), they can apply a deduction or claim at the same time. For this reason, claims and deductions can be triggered by customer returns. As such, TM provides the ability to create a Return Materials Authorization (RMA) that is passed directly into Order Management with the status Booked. Ultimately, this RMA goes through OM processes, finally generating a credit memo. When this happens, TM can automatically locate it using the Claims Settlement Fetcher program. This program enables automatic closure of a claim

or deduction using the credit memo. For this integration point, several OM setups are required. For details see [Section 6.4.7.1, "Setting Up Transaction Types"](#).

For more details on how to setup Order Management, refer to the *Oracle Order Management Suite Implementation Guide*.

To setup transaction types for OM, use the following procedure.

6.4.7.1 Setting Up Transaction Types

For TM, you must verify the OM Transaction Type Setup. The life-cycle of an order is driven by its transaction type and the workflow set up behind it. For an RMA, the workflow determines many factors, such as whether or not the return order will affect inventory.

To set up transaction types in OM, use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with the Order Management Responsibility.
2. Navigate to Setup > Transaction Types > Define.
3. Query for the transaction type.
Query for the type you plan on using for Trade Management RMAs.
4. Verify that the transaction type code is ORDER.
5. Verify that Order Category is either Mixed or Return.
6. Note the Order Workflow.
7. On the Main tab, verify that there is a Default Return Line Type populated.
8. On the header, click on Assign Line Flows button.
9. Verify that Order Type is populated.
10. In the Assign Workflow Processes table:
 - a. Find the Return Line Type entered on the Main tab, and note the Process Name.

For TM, workflow determines whether a credit is generated for the RMA. A credit memo is generated if the workflow contains an Invoicing Activity function. This function must be checked using Oracle Workflow Builder, a mandatory setup for RMAs to work in Trade Management.

After workflow does its basic check, it contains an Invoicing Activity, which generates a credit.

- b. Verify that the workflow is assigned to a valid transaction type. After verifying that there is a valid transaction type
 - c. Assign this in the TM System Parameters and/or Claim Types.
11. Save your work.

6.4.8 Verifying the Oracle Marketing Implementation

Trade Management shares many Oracle Marketing common setups, for example custom setup, locking rules, and mandatory rules. For more information, see [Section 3, "Implementing Oracle Marketing"](#)

To verify Marketing setups for TM, perform the procedures in the following sections:

- [Section 6.4.8.1, "Creating Custom Setups for Trade Management"](#)
- [Section 6.4.8.2, "Creating Mandatory Rules for Trade Management"](#)
- [Section 6.4.8.3, "Creating Locking Rules for Trade Management"](#)
- [Section 6.4.8.4, "Creating User Statuses for Trade Management"](#)
- [Section 6.4.8.5, "Creating Approval Rules for Trade Management"](#)

6.4.8.1 Creating Custom Setups for Trade Management

In Trade Management, budgets, offers and claims use custom setups.

Custom setups:

- Define the prefix for the number or code - a unique identifier.
- Determine the layout of the side navigation items located on the left panel in the UI.
- Determine if an object requires approval (does not apply to budgets).

For specific procedures, see [Section 3.14.2, "Creating a Custom Setup"](#).

6.4.8.2 Creating Mandatory Rules for Trade Management

In TM, budgets, offers and claims can use mandatory rules. Mandatory rules enable a company to control data entry by requiring that data be entered in specific data fields on specific screens.

For example, Contact in claims is by default an optional field. If your business requirements mandate that users must select a value for this field, then create a mandatory rule to enforce this business requirement.

For specific procedures, see [Section 3.19, "Setting Up Mandatory Rules"](#).

6.4.8.3 Creating Locking Rules for Trade Management

In Trade Management, budgets and claims can use locking rules. Locking rules allow companies to control data entry by disallowing updates to certain data when that data is a certain status.

By design, locking rules are ignored for the Oracle Marketing Super User responsibility. In other words, when an Oracle Marketing Super User is logged in, the fields which are supposed to be locked can be updated.

For specific procedures, see [Section 3.20, "Setting Up Locking Rules"](#)

6.4.8.4 Creating User Statuses for Trade Management

In Trade Management, budgets, offers and claims can utilize user statuses.

System statuses drive certain behaviors of a marketing object. User statuses do not drive behavior, but can be used for classification purposes. User statuses are created on top of system statuses.

For specific procedures, see [Section 3.18, "Setting Up User Statuses"](#)

6.4.8.5 Creating Approval Rules for Trade Management

In Trade Management, budgets, offers and claims can use approval rules. When approvals are required, approval rules can be created to determine who approves what and under what circumstances they can approve.

Approval rules for budgets or for budget requests, such as a request for funding for an offer, can be configured using multiple parameters. Parameters can include amount, budget category, organization and custom setup.

Approval rules for claims can be configured using multiple parameters such as amount, claim type, claim reason, and organization. When claim processors determine settlement methods for their claims, managerial approval may be

required. Approval rules can be set up so that the settlement process will not proceed until approval is given.

For specific procedures, see [Section 3.21, "Setting Up Approval Rules"](#)

6.4.9 Implementing the Account Generator

TM creates accounting entries in GL in the following manner:

- **Promotional accruals:** Base GL accounts are taken from a budget, a budget category, or system parameters.
- **Budget adjustments:** Base GL accounts are taken from a budget, a budget category, or system parameters.
- **Promotional claim and deduction settlements:** Base GL accounts are taken from the claim type or system parameters.

By using the TM account generator workflow, rather than the base GL accounts, you can configure these accounts dynamically. Configuration is accomplished by modifying the account generator workflow using the workflow administration tool. Values of various segments for each account can be changed.

6.4.9.1 Account Generator Workflow

The workflow API used to derive Accrual liability and Expense account information is called AMS : Account Generator. This workflow process happens when utilizations are accrued or adjusted from:

- Accrual offers
- Lumpsum offers
- Trade Deals
- Scan data offers
- Volume offers
- Manual adjustments

When implemented, Account Generator replaces the GL product segment account information with the product segment of the COGS account (from inventory item based on which accrual is made). If an inventory item cannot be determined for the utilization, then the base GL account is used.

Modifying the Account Generator requires expertise in the following areas:

- PL/SQL

- Oracle Workflow
- General Ledger

The Trade Management Account Generator consists of the following:

- Process: Generate a default account
- Function: Get expand CCID for line
- Package: AMS_ACCT_GENERATOR
- Procedure: Get Cost_Sale_Item_Derived

6.4.9.2 Debugging the Account Generator

To debug the account generator workflow, set the profile Account Generator : Debug mode to Yes. The workflow process can then be seen from process editor. The owner of the workflow runs the concurrent program or performs an action which invokes accounting.

Workflow processes can then be seen from the process editor and the owner of the workflow will be the user who runs the concurrent program or performs an action which invokes accounting.

The default account generator assumes an accounting structure with a product segment named Product. This must be changed in the workflow based on the implementation. Additional attributes, functions and processes can be added. The current process can be customized to suit business requirements.

6.4.9.3 Understanding Account Generator Prerequisites

Before using the Account Generator to create an accrual liability or expense accounts, you must perform the following prerequisite tasks:

- Define your accounting flexfield structure for each set of books.
- Define flexfield segment values and validation rules.
- Determine whether your organization will use the default Account Generator process, or customize it to meet your accounting needs. TM comes with the following Account Generator item type: Generate Default Account.

You must also do one of the following for each set of books:

- Choose to use the default Account Generator process.
- Customize the default Account Generator process, test your customization, and choose the process for a flexfield structure, if necessary.

Evaluate whether the default Account Generator process meets the accounting requirements of your organization. The default process can be updated later as needs change. You may only need to make minor changes to the default process without changing its name.

Note: Be sure to read the Account Generator chapter in the *Oracle Applications Flexfields Guide* before customizing the Trade Management Account Generator.

6.4.10 Implementing the Account Generator Workflow

To implement the Account Generator workflow process, follow the procedures in the following sections:

- [Section 6.4.10.1, "Starting Generating Code Combination \(Node 1\)"](#)
- [Section 6.4.10.2, "Copying Values from Code Combinations \(Node 2\)"](#)
- [Section 6.4.10.3, "Getting the CCID for a Line \(Node 3\)"](#)
- [Section 6.4.10.4, "Copying Segment Value from Code Combinations \(Node 4\)"](#)
- [Section 6.4.10.5, "Validating Code Combination \(Node 5\)"](#)
- [Section 6.4.10.6, "Ending Generating Code Combination \(Node 6\)"](#)
- [Section 6.4.10.7, "Default Function to get COGS Account"](#)
- [Section 6.4.10.8, "Default Attributes defined in Workflow"](#)
- [Section 6.4.10.9, "Lookups Codes for Accrual Liability and Expense Accounts"](#)
- [Section 6.4.10.10, "Attributes Set in Workflow"](#)

6.4.10.1 Starting Generating Code Combination (Node 1)

This is a standard activity that marks the start of the workflow process.

6.4.10.2 Copying Values from Code Combinations (Node 2)

This function copies all the segment values from a given code combination to the combination that is being generated. This function has two attributes:

- **Code Combination ID:** The Default Code Combination ID (CCID) set when the workflow is invoked.
- **Replace Existing Value:** Set to True to always copy the segment values.

6.4.10.3 Getting the CCID for a Line (Node 3)

This function determines a value that is used by Node 4 to derive the Accrual Liability/Expense Accounts. The derivation of this value cannot be achieved using standard Oracle workflow functions. Instead, a PL/SQL procedure is used to derive the COGS (Cost of Goods Sold) Account CCID for an inventory item.

If the function executes successfully and receives a CCID, the process branches to Node 5. If the function is unable to derive a COGS Account CCID, then the function branches to Node 4.

6.4.10.4 Copying Segment Value from Code Combinations (Node 4)

This function copies a specific segment value from a given code combination to the combination being generated. This function has four attributes:

- **Code Combination ID:** The COGS CCID that was derived in Node 3.
- **Segment Identifier:** Set to Name since this will replace a segment that has a name of Product
- **Segment Value:** Set to a constant value of Product, which denotes the name of the segment.
- **Replace Existing Value:** Set to True to always copy the segment values.

This function gets the Product segment from COGS CCID and replaces it with this value on the generated code combination ID.

6.4.10.5 Validating Code Combination (Node 5)

This function executes after Node 4 where the default account is modified, or after Node 3 when Node 3 fails to get COGS CCID. It validates the generated code combination and has two attributes.

- **Validation Type:** Set to Generate Code Combination ID to execute a full validation and generate a code combination ID.
- **New Code Combinations are Allowed:** Set to Trow so that if the key flexfield structure has dynamic insert allowed, then the validation will not generate an error if the combination does not exist in the code combination table.

6.4.10.6 Ending Generating Code Combination (Node 6)

This function is called to end the Generate Default Account process. It is marked as the End activity.

6.4.10.7 Default Function to get COGS Account

The function, Get CCID for a Line, gets the COGS account from inventory item and assigns the value into a workflow attribute.

6.4.10.8 Default Attributes defined in Workflow

The following table lists attributes and the location or field from which they are derived:

Table 6–3 *Default Attributes in Workflow*

Attribute	Field or Location
Header ID	Order Header
Order Category	Order Category
Order Type ID	Order Type
Price Adjustment ID	Price Adjustment
Line ID	Order Line
Commitment ID	Line Commitment
Salesrep ID	Salesrep
Option Flag	Oe_Globals.G_ITEM_OPTION
Organization ID	Shipping Organization or Organization giving Lumpsum, Adjustment
Customer ID	Sold to Customer
Chart of Accounts ID	Based on set of books in system parameters
Operating Unit	Booking Organization or Organization giving Lumpsum, Adjustment
Budget ID	Budget
Offer ID	Offer
Inventory Item ID	Product
Item Category ID	Product Category
Generated CC ID	Used to store the COGS (Cost Of Goods Sold) Account
Default CC ID	Default Account from Budget
Account Type	Account Type being derived

6.4.10.9 Lookups Codes for Accrual Liability and Expense Accounts

The lookup codes for Accrual Liability and Expense Accounts are as shown in the following table:

Table 6–4 Lookup Codes

Attribute	Source
Accrual Liability	ACCRUAL_LIABILITY
Expense Account	EXPENSE_ACCOUNT
Error Message	To store error messages, if any
Claim ID	For future use
Transaction Type	For future use

6.4.10.10 Attributes Set in Workflow

Attributes that will be set in workflow may change based on the method used to accrue the utilizations. See the tables below for a list of these attributes.

Table 6–5 Lumpsum Offers Attributes

Attribute	Field or Location
Organization ID	Organization offering the Lumpsum offer
Customer ID	Customer receiving the Lumpsum offer
Chart of Accounts ID	Chart of Accounts for the Set of Books in the System Parameters
Operating Unit	Organization offering the Lumpsum offer
Budget ID	Budget sourcing the Lumpsum offer
Offer ID	Lumpsum offer
Inventory Item ID	Product
Item Category ID	Product Category (either Product or product category will exist on a lumpsum record, but not both)
Account Type	Accrual Liability or Expense Account
Default CC ID	Default account CC ID
Generated CC ID	COGS Account derived from inventory item, if one exists
Account Type	Account Type being derived

Table 6–6 Accruals at Order Header Attributes

Attribute	Field or Location
Header ID	Order Header
Order Category	Order Category
Order Type ID	Order Type
Price Adjustment ID	Price Adjustment
Salesrep ID	Salesrep at Order Header
Organization ID	Shipping Organization
Customer ID	Sold to Customer
Chart of Accounts ID	Based on set of books in system parameters
Operating Unit	Booking Organization (Org ID)
Budget ID	Budget sourcing the Accrual
Offer ID	Accrual Offer
Inventory Item ID	Product which accrues
Account Type	Account Type being derived
Generated CC ID	Used to store the COGS (Cost Of Goods Sold) Account
Default CC ID	Default Account from Budget

Table 6–7 Accruals at Order Line Attributes

Attribute	Field or Location
Header ID	Order Header
Order Category	Order Category
Order Type ID	Order Type
Price Adjustment ID	Price Adjustment
Line ID	Order Line
Commitment ID	Line Commitment
Salesrep ID	Salesrep at Order Line
Organization ID	Shipping Organization
Customer ID	Sold to Customer

Table 6–7 Accruals at Order Line Attributes

Attribute	Field or Location
Chart of Accounts ID	Based on set of books in system parameters
Operating Unit	Booking Organization (Org ID)
Budget ID	Budget sourcing the Accrual
Offer ID	Accrual Offer
Inventory Item ID	Product which accrues
Account Type	Account Type being derived
Generated CC ID	Used to store the COGS (Cost Of Goods Sold) Account
Default CC ID	Default Account from Budget

Table 6–8 Manual Adjustment Attributes

Attribute	Field or Location
Organization ID	Shipping Organization
Customer ID	Sold to Customer
Chart of Accounts ID	Based on set of books in system parameters
Operating Unit	Booking Organization (Org ID)
Budget ID	Budget sourcing the Accrual
Offer ID	Accrual Offer
Inventory Item ID	Product which accrues
Item Category ID	Product Category on which adjustment is made (either the product or item category can exist on an adjustment record, but not both)
Account Type	Account Type being derived
Generated CC ID	Used to store the COGS (Cost Of Goods Sold) Account
Default CC ID	Default Account from Budget

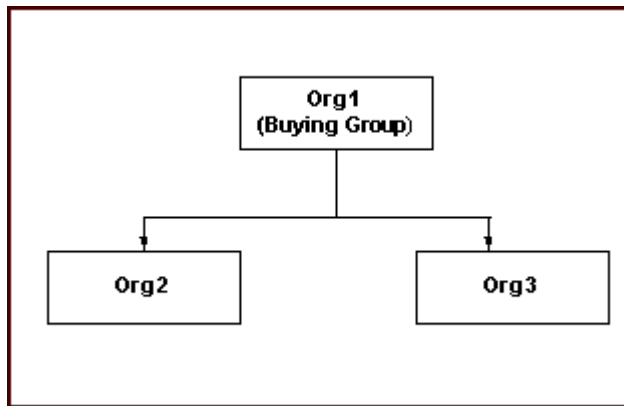
6.4.11 Setting Up Buying Groups

Buying groups are formed to enable companies to form “groups” that leverage high volume purchase discounts. Buying groups that purchase in bulk allow a company to negotiate more competitive pricing. Buying groups are commonly found in the

broad definition of the consumer goods sector. They are formed in TM by linking various TCA parties together based on a pre-determined party relationship.

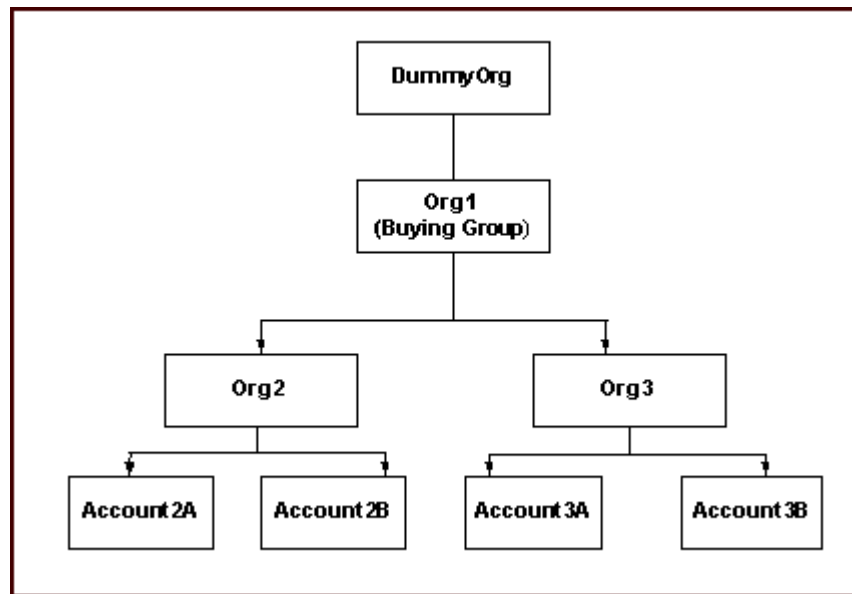
Assume Organization 1 below is the buying group. Organization 2 and 3 are members of the buying group.

Figure 6–1 Buying Group Organizational Structure



In TM, for buying groups to function properly, a dummy Organization at the top level is required. This dummy Organization is linked to Organization 1 through a Relationship Type. Organization 1 is linked to Organization 2 and Organization 3 through the same Relationship Type. The Organization is linked to the relationship type through the profile AMS : Relationship Type for buying group. These relationship types are created in TCA.

When creating offers, you can create the offer for Organization 1, the buying group. When you do, all accounts below it will get the offer. In our example, Acct 2A, Acct 2B, Acct 3A, Acct 3B will all receive the offer. As such, the overall buying group or structure is as follows:

Figure 6–2 Buying Group Organization Structure for Trade Management

To create a buying group, use the following procedure.

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Profile > System.
3. Query for AMS: Relationship Type profile (at the site level).
Decide on a relationship type to use for defining buying groups, and select that for the buying groups system profile
4. Log in to Trade Management with the Trade Management responsibility.
Because it is mandatory that you build the hierarchy from the top down, start with the Dummy organization.
5. Navigate to Audience > Organization
6. Search for Dummy organization created in step 3.

7. Select the Relationships link.

8. Select Add Relationship.

The Add organization to organization Relationship page opens.

9. In the Select an organization fields, Select organization 1.

10. Select Create.

Now you have built a link between Dummy organization and organization 1. Next, build the links from organization 1 to organization 2 and organization 3.

11. Navigate back to Audience > Organization. Drill down into organization 1 and repeat the steps above for linking organization 1 and organization 2. Repeat as necessary.

12. Run the concurrent program **AMS-TM : Generate Party List for Market Qualifiers**.

13. After the buying group is built, you can create an offer for organization 1.

6.5 Implementing Claims

Implementation tasks for claims must be complete prior to performing any administrative task. How claims is implemented will vary depending on your business requirements.

To implement claims, follow the procedures in these sections:

- [Section 6.5.1, "Setting System Profiles for Claims"](#)
- [Section 6.5.2, "Create and Verify Lookups for Claims"](#)
- [Section 6.5.3, "Running Concurrent Programs for Claims"](#)

6.5.1 Setting System Profiles for Claims

Set the following system profile options for claims.

Table 6–9 System Profiles for Claims

Option	Required	Level	Setting	Effect/Limitation
AMS : Claim Write Off Threshold	No	Site Appl Resp User		This write-off threshold is defined as the difference between the total and the settlement value returned from AR. For an invoice-related deduction, if the difference (Claim amount less the AR credit memo amount) is less than the write-off threshold amount, TM automatically creates a write-off claim line and creates a negative adjustment to the invoice.
AMS : Implement Payables Integrations		Site Appl Resp User	Yes/No	This profile value determines the availability of the check settlement method in TM. Yes = settlement by check is available.
AMS : Implement Contra Charge Payment Method	Yes	Site	Yes/No	Yes = Contra Charge settlement method is available. Contra charges are used to track offsetting balances for creditors who are also debtors.
AMS : Show GL Accounts on Screen	No	Site Appl Resp User	Yes/No	Yes = GL account numbers are displayed.
AMS : Update Claim Access	No	Site User	Yes/No	Yes = non-claim owners AND non-claim team members can update and view claims. No = non-claim owners AND non-claim team members can view claims only.

Table 6–9 System Profiles for Claims

Option	Required	Level	Setting	Effect/Limitation
AMS : Allow Un-Related Ship To On Claims	No	Site	Yes/No	Yes = the ship to site can be un-related to the bill to site. Order Management and AR both allow this. Since TM integrates closely with these two, a similar profile option is provided.
AMS : AR Credit Method For Rule	Yes	Site Resp	Credit method values from AR	Determines which revenue and transaction line balances will be impacted when TM creates an invoice credit to settle a deduction. The selections are passed to AR.
AMS : AR Credit Method For Installment	Yes	Site Resp	Credit method values from AR	Determines which revenue and transaction line balances will be impacted when TM creates an invoice credit to settle a deduction. The selections are passed to AR.

6.5.2 Create and Verify Lookups for Claims

Create or verify the following lookups for claims:

Table 6–10 Lookups for Claims

Key	Type	Values	Meanings
AMS_CLAIM_CLASS	System	Claim Deduction Overpayment Charge	Claim Deduction Overpayment Debit Claim
AMS_CLAIM_HISTORY_EVENT	System	Changes Line New Split	Changes Line New Split (All the available Events tracked in Claim History)
AMS_PAYMENT_METHOD	Extensible	Chargeback Check Contra_Charge Credit_Memo Debit_Memo On_Acct_Credit Reg_Credit_Memo RMA Write_Off	Chargeback Check Contra Charge Credit Memo - On Account Debit Memo On Account Credit Credit Memo - Invoice RMA Write Off Changing the meaning of the values will change the display name in TM. For example, if you change the meaning of RMA to Return Order, then Return Order is displayed as the settlement method instead of RMA.

Table 6–10 Lookups for Claims

Key	Type	Values	Meanings
AMS_CLAIM_STATUS	System	New Open Complete Pending_Approval Approved Pending_Close Closed Rejected Cancelled Duplicate	New Open Complete Pending Approval Approved Pending Close Closed Rejected Cancelled Duplicate
AMS_CREATION_SIGN	System	+ - Any	Positive Negative Any These lookups are the filter conditions available for selecting transaction types in claim types.
AMS_GL_DATE_TYPE	System	Claim_Date Due_Date System_Date	Claim Date Due Date System Date These lookups are the values available for selecting a GL date in system parameters.
AMS_GL_EVENT_LINE_TYPE	System	Accrual_Liability Expense_Account Rec_Clearing Ven_Clearing	Accrual Liability Expense Account Receivable Clearing Acct. Vendor Clearing Account These lookups are the values available for the types of accounts used by TM GL postings.
AMS_GL_EVENT_STATUS	System	Accounted Accounted_With_Error Created	Accounted Accounted with Error Created a New Transaction These lookups are the values available for the statuses of TM GL postings.

Table 6–10 Lookups for Claims

Key	Type	Values	Meanings
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 ASSO SUMMARY_VIEW	System	Activity Doc_Class Product Schedule	Activity Document Class Product Schedule When associating earnings, promotional accruals can be summarized by the views in these lookup.
AMS_PAYMENT_STATUS	System	Incomplete Interfaced Paid Pending	Incomplete Interfaced Paid Pending Payment status is different from claim status. Once a claim has been approved, the claim settlement process begins. These values indicate the status of the payment (credit memo, check, chargeback, write off, and so on). When claim status is Closed, payment status is always Paid. When claim status is Pending Close, the payment status can be Interface or Pending.
AMS_REASON_CODE_TYPE	User	Adjust_Reason Invoicing_Reason	Adjustment Reason Invoicing Reason When creating claim reasons, AR reasons can be associated. The two types of AR reasons available are created using this lookup.

Table 6–10 Lookups for Claims

Key	Type	Values	Meanings
AMS_AUTOPAY_ PERIOD_TYPE	System	Days Months Quarters Weeks Year	Days Months Quarters Weeks Year These values define the Autopay frequency.

Table 6–10 Lookups for Claims

Key	Type	Values	Meanings
AMS_LINE_OVER_TYPE	System	CAMP CB CM CSCH DELV DM EVEH INVOICE OFFR ORDER PCHO TP_ORDER	Campaign Chargeback Credit Memo Schedule Deliverable Debit Memo Event Invoice Offer Order Purchase Order Third Party Order These values are the available types used when entering a claim line.
AMS_LINE_ACTIVITY_TYPE	System	CAMP DELV EVEH OFFR	Campaign Deliverable Event Offer These values are the available activities used when entering claim line details.
AMS_OBJECT_CLASS	System	CB CM DM Invoice Order Pcho TP_Order	Chargeback Credit Memo Debit Memo Invoice Order Purchase Order Third Party Order

6.5.3 Running Concurrent Programs for Claims

Run the following concurrent programs for claims *after* the use of claims has commenced — *not* at the time of implementation.

Table 6–11 *Concurrent Programs for Claims*

Concurrent Manager	Required	Description
AMS-TM: Claims Autopay	Yes	Autopay can be set up to regularly pay accruals based on a customer, budget, campaign or offer. When it runs, it looks at the specified budget, customer, offer, or campaign; finds their outstanding accruals; finds an Autopay payment frequency or threshold set up for each customer; finds the payment preference; and automatically creates a claim. It also triggers the claim settlement process, which may first go through the approval process. The settlement method selected for each claim is either check or credit and is based on the payment preference set up in the customer’s trade profile.
AMS-TM: Claims Aging Population	Yes	This program is required for using the Claims Aging View. It must be run when using time periods, defined in the Aging Bucket created in AR. This program populates the Aging Bucket, grouping them by customer. Aging is 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 can be aged using a future type. This type displays claims that will become due, based on the due date, the specified number of days in the future.

Table 6–11 Concurrent Programs for Claims

Concurrent Manager	Required	Description
AMS-TM: Claims Settlement Fetcher	Yes	This program retrieves transactions created in Payables (check) or Receivables (credit memo or debit memo) as a result of a claim settlement, update, or closure. Claim settlement on manual claims is created through Autoinvoice or Payables Open Interface Import. These programs run in batch mode. After the actual payment is created in AR or AP, Claim Settlement Fetcher must run. This causes the data to show in claims. The program is also used: ■ To close out deductions or overpayments settled with credit or debit memos using Autoinvoice. ■ When deductions are settled with an RMA. Parameters: ■ Claim Class ■ Payment Method ■ Claim Type ■ Reason ■ Customer

Table 6–11 Concurrent Programs for Claims

Concurrent Manager	Required	Description
AMS-TM: Transfer to General Ledger	Yes	This program transfers accounting entries created in TM interface tables to GL interface tables. Optionally, you can automatically create the entries as journals using Journal Import. In this case, after the entries are turned into journals, they must be Posted to complete the GL process. Parameters: Set Of Books: Primary set of books. Batch Name: Name of batch for transfer. This is optional. From Date: Transfer entries created starting from this date. To Date: Transfer entries created ending this date. Journal Category: Options are All, Fixed Budgets, Accrual Budgets, and Settlement. Validate Accounts: Options are Yes or No. This value determines whether GL accounts are validated during transfer. Transfer to GL Interface: Options are In Detail, Summarize by Accounting Date, and Summarize by Accounting Period. Submit Journal Import: Options are Yes or No. This value determines whether Journal Import is run when the entry is transferred to GL. If Yes, a journal is created for an entry. If No, the entries sit in GL interface tables until a GL user runs the Journal Import program in GL.

Table 6–11 Concurrent Programs for Claims

Concurrent Manager	Required	Description
AMS-TM: Import Claims	Yes	In addition to creating claims manually in TM, you can also import claims using the Import Interface. This data is from legacy or third party systems. Companies implementing TM can populate an interface table and run a concurrent process to create claims automatically in TM. The Import Claims program pushes the data from the interface tables into TM claims. It runs through the standard validation process for claims creation, rejecting the claims that are not successful for import. Parameters: None.
AMS: Claims Import Purge	No	This program is used to purge the claims import interface table. Parameters: None.
AutoInvoice - Oracle Receivables	Yes	This program is an Oracle Receivables concurrent program used to create transactions such as credit memos and debit memos. For TM purposes, this program is run for the batch source defined in system parameters. It must be run because all claim settlements for Receivables are created with that batch source. For more information on options see the <i>Oracle Receivables Implementation Guide</i>.
Payables Open Interface Import - Oracle Payables	Yes	This program is used to create invoices in Payables. For TM purposes, this program is run for the batch source defined in system parameters. It must be run because all claim settlements for Payables are created with that batch source. For more information on parameters and options see the <i>Oracle Payables Implementation Guide</i>.
AMS - Team Access Refresh Program	Yes	This program is used for all objects using teams including claims. When changes occur to teams, this program must be run to update the team information.

6.6 Administering Claims

The way in which you administrate the claims component of TM depends on the requirements mandated by your business. Therefore, only implement the functionality below as needed.

- [Section 6.6.1, "Setting Up System Parameters Defaults for Claims"](#)
- [Section 6.6.2, "Setting Up Claim Types"](#)
- [Section 6.6.3, "Setting Up Claim Reasons"](#)
- [Section 6.6.4, "Setting Up Claim Action Defaults"](#)
- [Section 6.6.5, "Setting Up Trade Profiles"](#)
- [Section 6.6.6, "Setting Up the History Rule"](#)
- [Section 6.6.7, "System Status and User Status"](#)
- [Section 6.6.8, "Setting Up Approval Rules for Claims"](#)
- [Section 6.6.9, "Setting Up Autopay"](#)
- [Section 6.6.10, "Setting Up Claim Import"](#)
- [Section 6.6.11, "Setting Up Claim Ownership Assignment"](#)
- [Section 6.6.12, "Team Access and Security"](#)
- [Section 6.6.13, "Setting Up Discoverer"](#)
- [Section 6.6.14, "Implementing a Claim Settlement Workflow"](#)
- [Section 6.6.15, "Setting Up Claims Aging View"](#)

6.6.1 Setting Up System Parameters Defaults for Claims

System parameter defaults define the following basic information:

- **Set of Books:** When a user creates a budget in TM, it can be in any currency. In the background, however, a functional currency is recorded with the budget. The functional currency is the main currency used by the GL set of books. GL postings are created in this functional currency.
- **Accounting:** GL integration parameters are determined by system parameters.
- **Sales, Expense, and Charge Account:** For accruals that are created from lumpsum, accrual, scan data or volume offers. Accruals can be treated as a

liability and tracked in GL. TM provides the GL integration by creating the following accounting entries.

- Debit Sales or Expense or Charge
- Credit Liability

Using the System Parameter page, you can define the following default behavior:

- Accounting Method
- Account Postings
- General Ledger Date Type
- Sales, Expense, and Charge Account
- Accrual Liability Account
- Receivable Clearing Account
- Vendor Clearing Account
- Claim Reason
- Claim Type
- Claim Owner
- Assignment Manager (checkbox to indicate whether or not it is implemented)
- Days Due
- Exchange Type
- Receivables Batch Source
- RMA Transaction Type
- Debit Memo
- Credit Memo
- Payable Source
- Payable Payment Term
- Autopay (checkbox to indicate if it is implemented or not)
- Autopay Reason
- Autopay Claim Type
- Autopay Frequency

- Autopay Frequency unit

To set up these system parameter defaults, use the following procedure:

Prerequisites

Business requirements for defaults have been established

Steps

1. Log in to Oracle Marketing
2. Navigate to Administration > Marketing > Claim > System Parameters.
3. In the Accounting section, select defaults for the following:
 - **Accounting:** Place a check in the GL Accounting, Posting to GL, or Rounding checkboxes if you want to use them in your implementation.
 - **GL Date Type:** Using the drop-down menu, select a GL date type.
 - **Sales/Expense/Charge Account:** Click the flashlight icon to launch the flex alias selector. Select an appropriate alias (as it related to your business requirements) for the sales/expense/and charge account.
 - **Accrual Liability Account:** Click the flashlight icon to launch the flex alias selector. Select an appropriate alias (as it related to your business requirements) for the accrual liability account.
 - **Receivable Clearing Account:** Click the flashlight icon to launch the flex alias selector. Select an appropriate alias (as it related to your business requirements) for the receivable clearing account. When a claim or deduction is created and associated to promotional accruals, and if the settlement method is a credit memo, TM creates the following entries in GL:
 - Debit Liabilities
 - Credit Receivables Clearing
 - **Vendor Clearing Account:** Click the flashlight icon to launch the flex alias selector. Select an appropriate alias (as it related to your business requirements) for the vendor clearing account. When a promotional claim is settled by a check, the following GL entries are created:
 - Debit Liabilities
 - Credit Vendor Clearing

The Liabilities account used is the same one used when accruals occurred. The AP Clearing accounts used during claim settlement are taken from the following setups:

- As defined on claim type and any Account Generator workflow updates.
- As defined here in system parameters and any Account Generator workflow updates

4. In the Claim section, select defaults for the following:

- **Reason:** Click the flashlight icon to select a default claim reason.
- **Claim Type:** Click the flashlight icon to select a default claim type. When deductions or overpayments come through the AR system, a claim type is not captured. To handle this, claim type defaults can be created. For example, you could set up a claim type such as Unknown Claim Type or To be Determined.
- **Days Due:** Enter a default days due. The due date can be assigned for each customer or defaulted by the system (set here). When a claim is created, the days due in the customer's trade profile is assessed first. If not assigned, the days due is derived by the default established by the system parameters.
- **Exchange Type:** Use the drop-down menu to select a default exchange type. Claims can be created in a transaction currency different from the functional currency that is used by the overall set of books. When the exchange type is unclear, the exchange type selected in the System Parameter is used.
- **Default Owner:** Click the flashlight icon to select a default claim owner. A claim owner is the person responsible for bringing a claim to resolution. Claims may be assigned based on various criteria, such as claim type or reason. In cases when the assignment territory fails to assign an owner to the claim, it is imperative that a default owner be assigned. The default owner you set up might be an administrator or a claims analyst.
- **Assignment Manager Implemented Checkbox:** Check to indicate that Assignment Manager is turned-on. If this flag is checked, then claim owners are assigned based on territory setups. If not checked, the default owner on this page is designated as the claim owner when claims are created.

5. In the Settlement section, select defaults for the following:

- **Receivables Batch Source:** Use the drop-down menu to select a default batch source for receivables.
 - **RMA Transaction Type:** Click the flashlight icon to select a default RMA Transaction Type.
 - **Debit Memo:** Click the flashlight icon to select a default for debit memos.
 - **Credit Memo:** Click the flashlight icon to select a default for credit memos.
 - **Payables Source:** Use the drop-down menu to select a default payables source.
 - **Payment Payables Term:** Click the flashlight icon to select a default payables term.
6. In the Autopay section, select default for the following:
- **Autopay Checkbox:** Place a check in this checkbox to turn on the Autopay functionality.
 - **Reason:** Click the flashlight icon to select a default for Autopay reasons.
 - **Claim Type:** Click the flashlight icon to select a default for claim types.
 - **Frequency:** Enter a frequency number for Autopay.
 - **Frequency Unit:** Using the drop-down menu select a frequency unit for the frequency selected.
7. Select Update to save your work.

6.6.2 Setting Up Claim Types

Claims are categorized by types and reasons. This categorization enables you to put claims into different information buckets, enabling you to better analyze claim problems.

For example, a claim analyst might notice the claim type non-promotional being repetitively paired with the claim reason shipping. Based on this and other information, your company might decide to improve its shipping processes to reduce this type of claim.

In addition, information derived based on claim types can act as the business driver for various integration points (for example, with Account Receivables and Order Management).

Transaction types can be specified for credit memos, charge backs, debit memos and RMAs. Vendor and Receivable clearing accounts can be specified at claim type level.

Claim and transaction types are org-stripped, meaning they are specific to a particular operating unit. Therefore, you will only see the claim and transaction types set up for your operating unit.

To set up claim types, use the following procedure.

Prerequisite

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Claims > Claim Type.
3. Select Create.
4. In the Claims Type Detail Page provide the following information:
 - **Name:** Enter a unique name for the claim type.
 - **Start Date:** The starting date from which this claim type can be used.
 - **End Date:** The date when the claim type can no longer be used.
 - **Creation Sign:** Use to filter transaction types for credit memos, debit memos and charge backs. If you intend to fill in all transaction types, leave this selection empty.
 - **Description:** Optional. Enter a description for the claim type.
 - **Credit Memo:** Displays a list of transaction types created in AR for claims and deductions settled with credit memos. Select one that is negative. In AR, this parameter helps drive accounting for the credit memo. TM passes this to AR during settlement.
 - **Debit Memo:** Displays a list of transaction types created in AR for overpayment claims that are settled with a debit memo. Select one that is positive. In AR, this parameter helps drive accounting for the debit memo. TM passes this to AR during settlement.
 - **Chargeback:** Displays a list of transaction types created in AR for deductions that are settled with charge backs. Select one that is positive. In AR, this parameter helps drive accounting for the chargeback. TM passes this to AR during settlement.
 - **RMA Transaction Type:** Displays a list of transaction types created in Order Management. Do not confuse this with transaction types created in AR. In OM, this transaction type helps drive the default of price list, line type, and workflows that ultimately determine return order processing. For TM purposes, enter an RMA transaction type to generate a credit memo for

the RMA. Use the Invoicing Activity function for verification in the workflow assigned to the transaction type and line type. For more information see [Section 6.4.7.1, "Setting Up Transaction Types"](#)

- **Write-off Adjustment:** Displays a list of receivable activities created in AR for adjustments. Determines the accounting for the adjustment used when transaction-related deductions are settled with a write-off.
- **Receipt Write-off:** Displays a list of receivable activities created in AR of type Receipt Write-off. Determines the accounting for the receipt write-off when overpayments are settled with a receipt write-off.
- **Receivable Clearing Account:** When promotional claims or deductions are being settled with a credit memo, a debit entry for a liability account is created. Further, a credit entry is created for this receivable clearing account. This is passed to AR as the revenue account for the credit memo. The list of GL accounts you can select in this field is determined by the set of books setup in system parameters.
- **Vendor Clearing Account:** When promotional claims or deductions are being settled with a check, a debit entry for a liability account is created. Further, a credit entry is created for this vendor clearing account. It is passed to AP as the distribution account on the payables invoice. The list of GL accounts selected here is determined by the set of books setup in system parameters.

5. Select Create to save your work.

6.6.3 Setting Up Claim Reasons

Claim types and reasons work together, and are organization specific. This organization allows companies to group claims into specific information buckets. The goal of this functionality is to enable companies to analyze their claims, identify areas of inefficiency, and make improvements that will resolve or prevent further claims.

Claim reasons are used for:

- Classification
- Action defaults
- Integration point setups

Prerequisite

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Claims > Claim Reasons.
3. Select Create.
The Reason Detail page opens.
4. Provide the following information:
 - **Reason:** Enter a name of the reason.
 - **Start Date:** The starting date from which this reason can be used.
 - **End Date:** The date when the reason can no longer be used.
 - **Description:** Optional. Enter a description for the reason.
 - **Credit Memo Reason:** Optional. Displays a list reasons created in AR (CREDIT_MEMO_REASON QuickCode). If a claim or deduction with this reason is being settled with a credit memo, this reason is passed to AR.
 - **Adjustment Reason:** Displays a list of reasons created in AR (ADJUST_REASON QuickCode). When transaction-related deductions are being settled with a write-off or chargeback, this reason is passed to AR.
 - **RMA Transaction Type:** Displays a list of transaction types created in OM. Do not confuse this with transaction types created in AR, which are created with Transaction Type Code = ORDER and with a default return line populated. In Order Management, this transaction type helps drive the default of price list, line type, and workflows, ultimately determining return order processes. For TM, you must enter an RMA transaction type, which will generate a credit memo for the RMA. You can verify by using the Invoicing Activity function in the workflows assigned to the transaction type and line type.
 - **Actions:** Displays a list of actions created in TM. An action is a template using tasks. You can assign multiple actions using this field. If they are to be available for each claim (with the particular reason) then check the Active flag. To make this action default on any claim with this reason, check the Default button.
5. Select Create to save your work.

6.6.4 Setting Up Claim Action Defaults

Actions are pre-defined templates that contain a series of tasks to guide the research and resolution process of a claim. They are organization-specific, and provide the claims department with a comprehensive project management tool. A set of actions can be designated as default actions for a specific claim reason.

Prerequisite

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Claims > Actions.
3. Select Create.
The Action Detail page opens.
4. Provide the following information:
 - **Source Object:** Defaults to Marketing Claim.
 - **Name:** Enter a name for this action.
 - **Start Date:** The date from which the action can be used.
 - **End Date:** The date upon which the action can no longer be used.
 - **Description:** Optional. Enter a description for the action.
5. In the Task Templates section, create a task by entering basic information:
 - **Name:** Enter a name for the task.
 - **Description:** Describe the task.
 - **Priority:** Indicate the urgency of the task.
 - **Duration:** Enter a number.
 - **Duration Type:** Select Day, Hour, Minute, Month, Week or Year. The duration and duration type indicate how much time should be spent on the task.
 - **Task Type:** Select General or Approval.

For more information about tasks, refer to the *Oracle CRM Foundation Implementation Guide*.

6. Repeat the previous step for each task.
7. Select Create to save your work.
8. To designate an action as the default for a particular claim reason, see [Section 6.6.3, "Setting Up Claim Reasons"](#).

6.6.5 Setting Up Trade Profiles

Trade profiles are used to:

- Provide a link to vendor setups
- Assign days due
- Store payment preferences
- Store payment schedules
- Determine Autopay frequency for accrual reimbursement based on preferences and schedules

To set up a trade profile, follow the steps below:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Claim > Trade Profiles.
3. Click the icon next to the Party Name field.
A list of Parties appears.
4. Select a party from the list.
The screen refreshes, and the party number is displayed. If the party has a trade profile it is displayed; otherwise, the remaining fields are blank.
5. Click the icon next to the Account Name field.
A list of available accounts appears.
6. Select an account.

The Bill To site for the account selected will default here. To change it, click the icon next to the Site Use and select another site. Sites are org-striped. As such, the can only be used within an operating unit.

7. Click the icon next to Vendor to select the associated vendor.
 - A vendor is a person or company which sells to your company. Vendors are set up in AP and are separate from TCA. To settle claims using a check, you must set up that customer as a Vendor in Payables and Purchasing.
 - In the TM Trade Profile, we provide the link between the two setups in the two systems. Once set up in the Trade Profile, the Vendor information defaults on a claim automatically. Therefore claim processors do not need to select the vendor that maps to the customer. Vendors are not org-striped within Oracle applications. As such, they can be seen and used across multiple operating units.
 - If a customer account does not have a trade profile set up, or if the trade profile is missing vendor information, the claim owner will have to enter the vendor and vendor site information on the first claim to be settled by check for this account. When this occurs, the trade profile information for the account is automatically updated.
8. Click the icon next to Vendor Site, and select a specific site.

Vendor sites are org-striped.
9. Enter the normal days due for payments to the party.

Claims managers may require that claims for this account be resolved within a certain number of days. Enter that number here.

For example, your company may require that all claims for an important customer account be resolved with 15 days of creation. In the customer trade profile, you can assign 15 as the default days due. If a claim for this customer account is created on January 1, the due date defaults January 16.
10. Select the Autopay checkbox.

If checked, when Autopay runs, it will evaluate the accruals for this customer and automate payments as required. If not checked, Autopay will not automate payments for this customer even if accruals exist.
11. Enter a Frequency value.

Enter this information as an integer, and select a Frequency Unit from the drop-down list. Together, these values define the frequency by which the

customer will be paid via the Autopay program. The values here override those in system parameters.

Threshold currency defaults based on the functional currency of the set of books selected in system parameters.

12. Enter a Threshold Amount value.

Threshold amount is another way to trigger Autopay actions.

For example, if frequency is set to two days, then the customer is paid every two days. If the threshold amount is set to \$100, then the customer will be paid whenever the accruals sum is $\geq$ \$100. When Autopay runs, only one of the two conditions, Frequency or Threshold, needs to be true for the customer to be paid.

13. Select a Payment Method:

- **Check:** If selected, the vendor and vendor sites fields must be filled in.
- **On Account Credit:** If selected, the Site Use field must be filled in. This field retrieves the Bill-to Site of the customer account.

14. Save your work.

6.6.6 Setting Up the History Rule

Use the History Rule option to record the changes made to a claim while it is being researched and processed.

Prerequisite

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Claim > History Rule.
3. Provide the following information:
 - **Parent Source Type:** Defaults to Claim.
 - **Object Attribute:** Different pages on a claim: Main, Lines, Line Detail, Associate Earning, Split, Settlement. Fields. These pages can be tracked in History.

4. Based on the page selected in Object Attribute above, the fields chosen are listed in the Available Columns.
5. For the objects selected for history tracking, use the arrows to move them to the History Rule Columns.
6. Select Update to save your work.

When changes are made to the fields in the History Rule Columns, they are captured in the history for that claim.

6.6.7 System Status and User Status

System statuses drive behavior for specific Oracle Marketing objects. User statuses are used in conjunction with system statuses for classification purposes.

The following table describes the claim statuses used in TM:

6.6.8 Setting Up Approval Rules for Claims

Approval rules for claims dictate which individuals in your organization must authorize the settlement of a claim and under what circumstances their approval is required. Approval rules can be configured using multiple parameters such as amount, claim type, claim reason, organization and custom setup.

The rules are evaluated based on the following parameters:

- Organization = 5
- Claim Reason = 4
- Claim Type = 3
- Custom Setup = 1

The higher the number, the more important the parameter in determining which rule will apply to a particular claim.

Prerequisite

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Approval Rule.
3. Change the value of Approval Rule for to Claim.

The page refreshes and claim specific attributes are displayed. Approval Type defaults to Claim.

4. Provide the following information:
 - **Approval Rule Name:** Enter a name for the approval rule.
 - **Start Date:** The date upon which the rule is available for use.
 - **End Date:** The date upon which the rule can no longer be used.
 - **Organization:** Displays a list of operating units.
 - **Claim Type:** Select a claim type.
 - **Reason:** Select a claim reason.
 - **Setup Type:** For claims this can be Claims, Debit Claims, Deductions, or Overpayments.
 - **Minimum Amount and Maximum Amount:** Define a range of claim amounts for this rule.
 - **Description:** Optional. Enter a description for the approval rule.
5. Select Create.

The page will refresh, displaying an Approvers table.
6. Using the Approvers table, indicate who must approve the claim:
 - **Order:** Enter integers in ascending order.
 - **Type:** Can be Function (for customization), Role (defined for marketing and assigned to resources), User.
 - **User/Role:** Depending on the Type selected above, this displays a list of functions, roles or users
 - **Start Date:** The date upon which the approver becomes active. Within the range of the approval rule, each line can have a start date and end date.

- **End Date:** The date upon which the approver becomes inactive.

7. Select Update.

6.6.9 Setting Up Autopay

Autopay automates the following business processes:

- Turns un-paid accruals into claims.
- Selects a settlement method.
- Associates earnings for claims.
- Initiates the settlement process.

Autopay is a concurrent program that can be scheduled to run periodically to pay a customer by:

- Credit memo
- Check

Autopay sums up customer accruals, automatically creates claims, associates earnings for claims, and settles claims based on customer trade profiles.

For example, you have a customer who is scheduled to be paid by credit memo every two weeks. When Autopay runs, it determines that the customer has utilized \$100K and was paid \$80K. It creates a claim for \$20K and settles it by credit memo. The customer receives a credit that can be applied towards future purchases.

The Autopay program schedule is setup in Forms, and is independent of the frequency set in TM.

The following implementation steps are recommended for Autopay:

1. Set up Trade Profiles and System Parameters.
2. Determine the most frequent setup.
3. Schedule Autopay.

For example, of all Trade Profiles in the system, the most frequent setup is for a customer called Business World. Their payment frequency is every two days. As such, the Autopay concurrent process threshold should be scheduled to run at least once every two days.

To set up Autopay, follow the procedures in the sections below:

- [Section 6.6.9.1, "Understanding Autopay Frequency"](#)
- [Section 6.6.9.2, "Setting Up the Autopay Concurrent Program"](#)
- [Section 6.6.9.3, "Setting Up the Autopay System Parameters"](#)

6.6.9.1 Understanding Autopay Frequency

We recommend that the Autopay concurrent program be scheduled to run at least as often as the autopay frequency for your most frequently paid customer (defined in the customer's Trade Profile).

Example 1: Autopay Program Runs More Frequently Than Customer's Trade Profile Autopay Frequency

The Autopay concurrent program is set to run daily at 4:00 PM. The autopay frequency set up in the trade profile for customer, Business World, is every two days. Their threshold is \$100.

- *Day 1:* The Autopay program runs, looks up all of the accruals for Business World, creates one claim for them, and pays it.
- *Day 2:* The Autopay program runs. Although the frequency condition for Business World is not met, Autopay checks its threshold condition. If Business World has accrued \$101 before 4 pm, then it will be paid. Otherwise it will not.
- *Day 3:* The Autopay program runs. The frequency condition for Business World is met. They are paid for all of their unpaid accruals since the last pay date, which may have been Day 1 or Day 2.

Example 2: Autopay Program Runs Less Frequently Than Customer's Trade Profile Autopay Frequency

The Autopay concurrent program is set to run every three days at 4:00 PM. The autopay frequency set up in the trade profile for customer, Business World, is every two days. Their threshold is \$100.

- *Day 1:* The Autopay program runs, looks up all of the accruals for Business World, creates one claim, and pays it.
- *Day 2 and 3:* Autopay does not run. Business World accrues a total of \$50 during these two days.

- *Day 4:* The Autopay program runs. It checks the frequency condition for Business World which is met, looks up all un-paid accruals since its last pay date (Day 1), creates one claim, and pays it.

In this scenario, the threshold amount for Business World does not affect the autopay process.

6.6.9.2 Setting Up the Autopay Concurrent Program

Autopay requires the concurrent manager program, **AMS-TM: Claims Autopay** to be run on a periodic basis.

To set up Autopay, follow the steps below.

Prerequisites

None

Steps

1. Log in to Oracle Forms with Oracle Marketing Administrator responsibility.
2. Navigate to Setups > Concurrent Requests.
3. Select Submit a New Request.
4. Select OK.
5. Locate the AMS-TM: Claims Autopay concurrent manager program.
6. Enter the following parameters:
 - **Customer Name:** This field is optional. Autopay groups accruals by customer accounts. If field is used, but Related Customer, Buying Group, and Members is not specified, the Autopay program will only look for all the accruals for the particular customer account. A claim is created for this customer account.
 - **Relationship Type:** This field is optional. If Related Customer is specified, this is the related buying group or member of the related customer. Otherwise, this is the buying group or member of the customer. If the field is used, Autopay will look for accruals for the buying group or member.
 - **Related Customer:** This field is optional. If this field is used, Autopay will look for accruals for the related customer.

This field is optional. If Related Customer is specified, this is the buying group or member of the related customer. Otherwise, this is the buying

group or member of the customer. If this field is used, Autopay will look for accruals for the buying group or member.

- **Include All Member Earning:** This field is optional. If this field is used, Autopay will look for accruals for all customer accounts that are members of the buying group specified above.
- **Pay To:** This field is optional. Valid values are Customer and Related Customer. If its value is Customer, payments for the claim will be made to the customer specified. If its value is Related Customer, payments for the claim will be made to the related customer.
- **Fund Name:** This field is optional. Enter a budget for which to collect accruals. If this field is used, the Autopay program will look for all accruals for this particular budget, then group them by customer accounts. For example, one claim per customer account, so multiple claims may be created.
- **Activity Type:** This field is optional. Select either Campaign or Offer.
- **Activity Name:** This field is optional. Based on the Activity Type, this filters for either Campaign Name or Offer Name.
- **Campaign Name:** If using this field, the Autopay program will look for all the accruals for this particular campaign, and then group them by customer account.
- **Offer Name:** If using this field, the Autopay program will look for all accruals for this particular offer, and then group them by customer account.
- **Product:** This field is optional. If using this, the Autopay program will look for all accruals for this particular product, and then group them by customer account.

Any combination of the above parameters will make Autopay check for all of the accruals that satisfy all of the parameters specified. For example, if a fund and campaign are specified, then only the accruals which satisfy both the fund and campaign name criteria are included for Autopay.

If no parameters are specified, then Autopay looks up the unpaid accruals for all Autopay customers, and groups them by customer account.

7. Click Submit.

6.6.9.3 Setting Up the Autopay System Parameters

To set up the Autopay parameters, follow the steps below:

Prerequisite

None

Steps

1. Log in to Oracle Marketing.

1. Navigate to Administration > Marketing > Claim > System Parameter.

2. Add a Reason.

The reason you enter here will appear on the claims created by Autopay.

3. Add a Claim Type.

The claim type you enter here will appear on the claims created by Autopay.

4. Fill in Frequency and Frequency Units. For more information on frequency, see [Section 6.6.9.1, "Understanding Autopay Frequency"](#).

These values are used if the trade profile for a customer does not contain the correct values. Frequency must be an integer that is ≥ 1 .

For example, if you want Autopay to run every two months then Frequency = 2, and Frequency Units = Months.

For Autopay to run twice every month, Frequency = 2, and Frequency Units = Weeks.

5. Navigate to Trade Profile.

6. Set up a trade profile for every customer you want to Autopay as follows:

Note: You can create a trade profile at the party level, at the account level, or at the site level.

- a. In the Party Name field, look up the customer name by clicking the search icon.

The party Number is displayed automatically. If a trade profile has already been created at the party level, the screen will redraw with the information.

- b. In the Account Number field, click the search icon and select an account number.

If a trade profile has already been created on the party level, the screen will redraw with the information.

- c. To link this customer this customer to a vendor and vendor site, select values for the Vendor and Vendor Site fields.
- d. Select the Autopay check box.
- e. Enter a Frequency and select a value for Frequency Units.

For more information on frequency, see [Section 6.6.9.1, "Understanding Autopay Frequency"](#). The values selected here override the parameters set in System Parameters. The threshold currency defaults to the functional currency used by the set of books selected in system parameters.

- f. Optionally, enter a Threshold Amount.

This amount is another way to trigger Autopay.

- 7. Click Update.

6.6.10 Setting Up Claim Import

Claims can be imported using the Import Interface tables. When using this features the following process takes place:

1. Data from legacy or third party systems is fetched.
2. The fetched data is used to populate the Claim and Claim Line interface tables.
3. A concurrent process is ran.
4. Claims are automatically created in TM.

To understand and implement Claim Import, see the following:

- [Section 6.6.10.1, "Understanding the Claim Concurrent Program"](#)
- [Section 6.6.10.2, "Understanding Claim Interface Tables"](#)

6.6.10.1 Understanding the Claim Concurrent Program

The concurrent program, **AMS-TM: Import Claim**, takes data from the interface tables, and creates claims and their associated claim lines. There are no parameters for this program.

First the claim is imported, then its corresponding claim lines are imported. When an error occurs, the program writes an error message. This message contains the id of the current record in the interface table. After writing the message, the concurrent program continues.

6.6.10.2 Understanding Claim Interface Tables

After the claim and claim lines are created successfully, the claim_id is recorded in the claim_id column of the claim interface table.

Two tables are used:

- OZF_CLAIMS_INT_ALL for claim information
- OZF_CLAIM_LINES_INT_ALL for claim line information

The OZF_CLAIMS_INT_ALL Table

The OZF_CLAIMS_INT_ALL table stores the data that must be imported to the ozf_claims_all table by the AMS-TM: Import Claim concurrent program.

Column Name: INTERFACE_CLAIM_ID

- Value: Primary key of the ozf_claims_int_all table. Cannot be null for any record.
- Validation: None.
- Destination: None.

Column Name: OBJECT_VERSION_NUMBER

- Value: version number of this record. Defaults to 1.
- Validation: None.
- Destination: None.

Column Name: CLAIM_ID

- Value: The claim_id for a claim record in ozf_claims_all table.
- Validation: Should be null before the import program.
- Destination: None.

Column Name: CLAIM_NUMBER

- Value: Customer specified claim number of a claim. If not specified, a unique number is generated.

- Validation: Claim number must be unique in the ozf_claims_all table.
- Destination: ozf_claims_all.claim_number.

Column Name: CLAIM_TYPE_ID

- Value: Id of a claim type. Defaulted from system parameters if not specified.
- Validation: Must exist in ozf_claim_types_all_b.claim_type_id.
- Destination: ozf_claims_all.claim_type_id.

Column Name: CLAIM_DATE

- Value: The date when a claim is created. Defaults to the system date if null.
- Validation: None.
- Destination: ozf_claims_all.claim_date.

Column Name: DUE_DATE

- Value: The date that a claim must be settled.
- Validation: Due_date >= claim_date.
- Destination: ozf_claims_all.due_date.

Column Name: SPLIT_FROM_CLAIM_ID

- Value: Do not populate this column.
- Validation: None.
- Destination: None.

Column Name: AMOUNT

- Value: The amount in the current (transactional) currency that is claimed.
- Validation: None.
- Destination: ozf_claims_all.amount.

Column Name: ACCTD_AMOUNT

- Value: Do not populate this column.
- Validation: None.
- Destination: None.

Column Name: CURRENCY_CODE

- Value: Currency code for the current transaction.
- Validation: Must exist in FND_CURRENCIES.CURRENCY_CODE.
- Destination: ozf_claims_all.currency_code.

Column Name: EXCHANGE_RATE_TYPE

- Value: Enter the exchange rate type for this transaction. If the currency of the transaction is not the same as the functional currency, one of the following combinations should exist:
 - exchange_rate_type and exchange_rate
 - exchange_rate_type and exchange_rate_dateOtherwise, the exchange_rate_type is defaulted based on the ozf_sys_parameters_all table and the current exchange_rate_date.
- Validation: Must exist in GL_DAILY_CONVERSION_TYPES.CONVERSION_TYPE
- Destination: ozf_claims_all.exchange_rate_type.

Column Name: EXCHANGE_RATE_DATE

- Value: The date when the exchange occurred.
- Validation: None.
- Destination: ozf_claims_all.exchange_rate_date.

Column Name: EXCHANGE_RATE

- Value: The exchange rate between transactional and functional currency.
- Validation: If ozf_claims_int_all.exchange_rate_TYPE = 'User' then this column must not be null; otherwise, it must be null.
- Destination: ozf_claims_all.exchange_rate.

Column Name: SET_OF_BOOKS_ID

- Value: The set of books id for the current organization.
- Validation: Must be the same ozf_sys_parameters_all.set_of_books_id based on ozf_claims_int_all.org_id and ozf_sys_parameters_all.org_id.
- Destination: ozf_claims_all.set_of_books_id.

Column Name: ORIGINAL_CLAIM_DATE

- Value: Do not populate.

- Validation: None.
- Destination: None.

Column Name: SOURCE_OBJECT_ID

- Value: The id for an invoice.
- Validation: If defined, it must exist in ra_customer_trx_all.cusomter_trx_id.
- Destination: ozf_claims_all. SOURCE_OBJECT_ID.

Column Name: SOURCE_OBJECT_NUMBER

- Value: The invoice number for an invoice
- Validation: If the claim_class is DEDUCTION and source_object_id is not null, then this column cannot be null. It must be the trx_number in ra_customer_trx_all where customer_trx_id = source_object_id.
- Destination: ozf_claims_all. SOURCE_OBJECT_NUMBER.

Column Name: SOURCE_OBJECT_CLASS

- Value: The source object class of a deduction. If the claim_class is DEDUCTION and source_object_id is not null, then the value of this column is INVOICE.
- Validation: None.
- Destination: ozf_claims_all. SOURCE_OBJECT_CLASS.

Column Name: SOURCE_OBJECT_TYPE_ID

- Value: The transaction type id for an invoice.
- Validation: If the claim_class is DEDUCTION and source_object_id is not null, then this column cannot be null. It must be the cust_trx_type_id in ra_customer_trx_all where customer_trx_id = source_object_id.
- Destination: ozf_claims_all. SOURCE_OBJECT_TYPE_ID.

Column Name: CUST_ACCOUNT_ID

- Value: The account_id of a customer.
- Validation: Cannot be null. It is cust_account_id in hz_cust_accounts WHERE hz_cust_accounts.status = 'A'.
- Destination: ozf_claims_all. CUST_ACCOUNT_ID.

Column Name: CUST_BILLTO_ACCT_SITE_ID

- Value: The billto_account_site_id for the customer.
- Validation: Must be the site_use_id for BILL_TO site from hz_cust_site_uses table for the customer.
- Destination: ozf_claims_all.CUST_BILLTO_ACCT_SITE_ID

Column Name: CUST_SHIPTO_ACCT_SITE_ID

- Value: The shipto_account_site_id for the customer.
- Validation: Must be the site_use_id for SHIP_TO site from hz_cust_site_uses table for the customer.
- Destination: ozf_claims_all.CUST_SHIPTO_ACCT_SITE_ID.

Column Name: LOCATION_ID

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: REASON_TYPE

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: REASON_CODE_ID

- Value: Id for the reason_code.
- Validation: Must exists in ozf_reason_codes_all_b.reason_code_id.
- Destination: ozf_claims_all.REASON_CODE_ID.

Column Name: STATUS_CODE

- Value: The status of the claim. Defaults to open when claim is created. Do not populate.
- Validation: None.
- Destination: None.

Column Name: USER_STATUS_ID

- Value: The user_status_id of the claim. Defaults to open when claim is created. Do not populate.

- Validation: None.
- Destination: None.

Column Name: PAYMENT_METHOD

- Value: The method of a payment.
- Validation: It is the lookup_code from AMS_LOOKUPS where lookup type is AMS_CLAIM_PAYMENT_METHOD.
- Destination: ozf_claims_all.payment_method

Column Name: SALES_REP_ID

- Value: Id for the sales rep.
- Validation: It is the hz_cust_site_uses.primary_salesrep_id based on either the cust_shipto_acct_site_id or cust_billto_acct_site_id.
- Destination: ozf_claims_all.SALES_REP_ID.

Column Name: COLLECTOR_ID

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: CONTACT_ID

- Value: Id for the contact person of the customer.
- Validation: must be a party_id from hz_parties with CONTACT_OF relationship.
- Destination: ozf_claims_all.CONTACT_ID.

Column Name: BROKER_ID

- Value: Id of the broker.
- Validation: must be a party_id from hz_parties with BROKER_OF relationship.
- Destination: ozf_claims_all.BROKER_ID.

Column Name: CUSTOMER_REF_DATE

- Value: The date an agent made a reference.
- Validation: None.

- Destination: ozf_claims_all.CUSTOMER_REF_DATE.

Column Name: CUSTOMER_REF_NUMBER

- Value: The reference number from an agent.
- Validation: None.
- Destination: ozf_claims_all. CUSTOMER_REF_NUMBER.

Column Name: RECEIPT_ID

- Value: The id of the receipt that the claim is referring to.
- Validation: Cannot be null if claim_class is DEDUCTION.
- Destination: ozf_claims_all. RECEIPT_ID.
- Column Name: RECEIPT_NUMBER.
- Value: The receipt number that the claim is referring to.
- Validation: Cannot be null if claim_class is DEDUCTION.
- Destination: ozf_claims_all. RECEIPT_NUMBER.

Column Name: SECURITY_GROUP_ID

- Value: Do not populate.
- Validation: None.
- Destination: None.

Column Name: ORG_ID

- Value: Do not populate.
- Validation: None.
- Destination: None.

Column Name AMOUNT_ADJUSTED

- Value: Do not populate.
- Validation: None.
- Destination: None.

Column Name: AMOUNT_REMAINING

- Value: Do not populate.
- Validation: None.

- Destination: None.
- Column Name: AMOUNT_SETTLED
 - Value: Do not populate.
 - Validation: None.
 - Destination: None.

Column Name: CLAIM_CLASS

- Value: It has two values CLAIM or DEDUCTION. It defaults to DEDUCTION if not specified.
- Validation: None.
- Destination: ozf_claims_all.CLAIM_CLASS.

Column Name: PAY_RELATED_ACCOUNT_FLAG

- Value: Indicates whether there is a related account to pay. Its value is Y or N.
- Validation: Y or N.
- Destination: ozf_claims_all.PAY_RELATED_ACCOUNT_FLAG.

Column Name: RELATED_CUST_ACCOUNT_ID

- Value: Account_id of the related customer.
- Validation: Same as cust_account_id. It cannot be null if PAY_RELATED_ACCOUNT_FLAG = 'Y'.
- Destination: ozf_claims_all.RELATED_CUST_ACCOUNT_ID.

Column Name: RELATED_SITE_USE_ID

- Value: Bill to site of a related customer.
- Validation: Same as cust_billto_acct_site_id. It cannot be null if PAY_RELATED_ACCOUNT_FLAG = Y.
- Destination: ozf_claims_all.RELATED_SITE_USE_ID.

Column Name: RELATIONSHIP_TYPE

- Value: relationship type with the related customer.
- Validation: None.
- Destination: ozf_claims_all.RELATIONSHIP_TYPE.

Column Name: `VENDOR_ID`

- Value: Id of the vendor.
- Validation: Must exist in `po_vendors.vender_id`.
- Destination: `ozf_claims_all.VENDOR_ID`.

Column Name: `VENDOR_SITE_ID`

- Value: Site id of the vendor.
- Validation: Must exist in `po_vendor_sites.site_id`.
- Destination: `ozf_claims_all.VENDOR_SITE_ID`.

Column Name: `TASK_TEMPLATE_GROUP_ID`

- Value: Id for the template group from task module.
- Validation: None.
- Destination: `ozf_claims_all.TASK_TEMPLATE_GROUP_ID`.

Column Name: `GL_DATE`

- Value: The date on which the claim settlement amount will be posted to GL. It defaults based on the payment method.
- Validation: None.
- Destination: `ozf_claims_all.GL_DATE`.

Column Name: `EFFECTIVE_DATE`

- Value: Id for the template group from task module.
- Validation: None.
- Destination: `ozf_claims_all.EFFECTIVE_DATE`.

Column Name: `CUSTOM_SETUP_ID`

- Value: Do not populate.
- Validation: None.
- Destination: None.

Column Name: `TASK_ID`

- Value: Do not populate.
- Validation: None.

- Destination: None.

Column Name: COUNTRY_ID

- Value: Do not populate.
- Validation: None.
- Destination: None.

Column Name: COMMENTS

- Value: Comments about the claim.
- Validation: None.
- Destination: ozf_claims_all.COMMENTS.

Column Name: OWNER_ID

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: HISTORY_EVENT

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.
- Column Name: HISTORY_EVENT_DATE.
- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: HISTORY_EVENT_DESCRIPTION

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: DUPLICATE_CLAIM_ID

- Value: For future use. Do not populate.
- Validation: None.

- Destination: None.

Column Name SPLIT_DATE

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name ROOT_CLAIM_ID

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: ACCTD_AMOUNT_REMAINING

- Value: For future use. Do not populate.
- Validation: None
- Destination: None

Column Name: TAX_AMOUNT

- Value: For future use. Do not populate.
- Validation: None
- Destination: None

Column Name: TAX_CODE

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: TAX_CALCULATION_FLAG

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: DOC_SEQUENCE_ID

- Value: For future use. Do not populate.
- Validation: None.

- Destination: None.

Column Name: DOC_SEQUENCE_VALUE

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: VOUCHER_ID

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: VOUCHER_NUMBER

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: SETTLED_BY

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: SETTLED_DATE

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: APPROVED_FLAG

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: APPROVED_BY

- Value: For future use. Do not populate.
- Validation: None.

- Destination: None.

Column Name: PAYMENT_STATUS

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: PAYMENT_REFERENCE_ID

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: PAYMENT_REFERENCE_NUMBER

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: PAYMENT_REFERENCE_DATE

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: TERRITORY_ID

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: ASSIGNED_TO

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: ATTRIBUTE_CATEGORY

- Enter the Descriptive Flexfield category information for this transaction. Descriptive Flexfield categories allow you to store different categories of attributes. This column is optional.
- Validation: None.
- Destination: `ozf_claims_all.ATTRIBUTE_CATEGORY`.

Column Name: `ATTRIBUTE1-15`

- Enter the Descriptive Flexfield attribute information for this transaction. Descriptive Flexfield attributes allow you to store additional columns, the contents of which you define. These columns are optional.
- Validation: None.
- Destination: `ozf_claims_all.ATTRIBUTE1-15`.

Column Name : `DEDUCTION_ATTRIBUTE_CATEGORY`

- Enter the Descriptive Flexfield category information for this transaction. Descriptive Flexfield categories allow you to store different categories of attributes. This column is optional.
- Validation: None.
- Destination: `ozf_claims_all.DEDUCTION_ATTRIBUTE_CATEGORY`.

Column Name: `DEDUCTION_ATTRIBUTE1-15`

- Enter the Descriptive Flexfield attribute information for this transaction. Descriptive Flexfield attributes allow you to store additional columns, the contents of which you define. These columns are optional.
- Validation: None.
- Destination: `ozf_claims_all.DEDUCTION_ATTRIBUTE1-15`.

Table Name: `OZF_CLAIM_LINES_INT_ALL`

This is the claim lines interface table. It stores data that needs to be imported to `ozf_claim_lines_all` table using AMS-TM: import Claims program.

Column Name: `INTERFACE_CLAIM_LINE_ID`

- Value: Primary key of the `ozf_claim_lines_int_all` table. Cannot be null for any record.
- Validation: None.
- Destination: None.

Column Name: OBJECT_VERSION_NUMBER

- Value: version number of this record. Defaults to 1.
- Validation: None.
- Destination: None.

Column Name: INTERFACE_CLAIM_ID

- Value: Foreign key to the ozf_claims_int_all table.interface_claim_id. Cannot be null for any record.
- Validation: None.
- Destination: None.

Column Name: SPLIT_FROM_CLAIM_LINE_ID

- Value: Do not populate this column.
- Validation: None.
- Destination: None.

Column Name: AMOUNT

- Value: The amount in the current (transactional) currency for this line.
- Validation: None.
- Destination: ozf_claim_lines_all.amount.

Column Name: CLAIM_CURRENCY_AMOUNT

- Value: The amount in the currency of the claim for the current line.
- Validation: None.
- Destination: ozf_claim_lines_all.CLAIM_CURRENCY_AMOUNT.

Column Name: ACCTD_AMOUNT

- Value: Do not populate this column.
- Validation: None.
- Destination: None.

Column Name: CURRENCY_CODE

- Value: Currency code for the current line.
- Validation: Must exist in FND_CURRENCIES.CURRENCY_CODE.

- Destination: ozf_claim_lines_all.currency_code.

Column Name: EXCHANGE_RATE_TYPE

- Value: same as ozf_claim_int_all.exchange_rate_type.
- Validation: same as ozf_claim_int_all.exchange_rate_type.
- Destination: ozf_claim_lines_all.exchange_rate_type.

Column Name: EXCHANGE_RATE_DATE

- Value: same as ozf_claim_int_all.exchange_rate_date.
- Validation: None.
- Destination: ozf_claim_lines_all.exchange_rate_date.

Column Name: EXCHANGE_RATE

- Value: same as ozf_claim_int_all.exchange_rate.
- Validation: same as ozf_claim_int_all.exchange_rate.
- Destination: ozf_claim_lines_all.exchange_rate.

Column Name: SET_OF_BOOKS_ID

- Value: same as ozf_claim_int_all.set_of_books_id.
- Validation: same as ozf_claim_int_all.set_of_books_id.
- Destination: ozf_claim_lines_all.set_of_books_id.

Column Name: SOURCE_OBJECT_ID

- Value: same as ozf_claim_int_all.source_object_id.
- Validation: same as ozf_claim_int_all.source_object_id.
- Destination: ozf_claim_lines_all.SOURCE_OBJECT_ID.

Column Name: SOURCE_OBJECT_CLASS

- Value: same as ozf_claim_int_all.source_object_class.
- Validation: None.
- Destination: ozf_claim_lines_all.SOURCE_OBJECT_CLASS.

Column Name: SOURCE_OBJECT_TYPE_ID

- Value: same as ozf_claim_int_all.source_object_type_id.
- Validation: same as ozf_claim_int_all.source_object_type_id.

- Destination: ozf_claim_lines_all.SOURCE_OBJECT_TYPE_ID.

Column Name: PAYMENT_STATUS

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: APPROVED_FLAG

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: APPROVED_DATE

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: APPROVED_BY

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: SETTLED_DATE

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: RELATED_CUST_ACCOUNT_ID

- Value: Account_id of the related customer.
- Validation: same as cust_account_id. It cannot be null if PAY_RELATED_ACCOUNT_FLAG = 'Y'.
- Destination: ozf_claim_lines_all.RELATED_CUST_ACCOUNT_ID.

Column Name: RELATIONSHIP_TYPE

- Value: relationship type with the related customer.

- Validation: None.
- Destination: ozf_claim_lines_all.RELATIONSHIP_TYPE.

Column Name: COMMENTS

- Value: Comments about the claim.
- Validation: None.
- Destination: ozf_claim_lines_all.COMMENTS.

Column Name: PAYMENT_METHOD

- Value: The method of a payment.
- Validation: same as ozf_claims_int_all.payment_method.
- Destination: ozf_claim_lines_all.payment_method.

Column Name: PAYMENT_REFERENCE_ID

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: PAYMENT_REFERENCE_NUMBER

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: PAYMENT_REFERENCE_DATE

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: VOUCHER_ID

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column Name: VOUCHER_NUMBER

- Value: For future use. Do not populate.

- Validation: None.
- Destination: None.

Column Name :ATTRIBUTE_ CATEGORY

- Enter the Descriptive Flexfield category information for this transaction. Descriptive Flexfield categories allow you to store different categories of attributes. This column is optional.
- Validation: None.
- Destination: ozf_claim_lines_all.ATTRIBUTE_ CATEGORY.

Column Name:ATTRIBUTE1-15

- Enter the Descriptive Flexfield attribute information for this transaction. Descriptive Flexfield attributes allow you to store additional columns, the contents of which you define. These columns are optional.
- Validation: None.
- Destination: ozf_claim_lines_all.ATTRIBUTE1-15.

Column: LINE_NUMBER

- Value: Number for the line created. Do not populate.
- Validation: None.
- Destination: None.

Column: VALID_FLAG

- Value: Indicates if the line is valid.
- Validation: None.
- Destination: None.

Column: PLAN_ID

- Value:
- Validation: None.
- Destination: None.

Column: OFFER_ID

- Value: For future use. Do not populate.
- Validation: None.

- Destination: None.

Column: PERFORMANCE_COMPLETE_FLAG

- Value: Indicates if performance was completed for the line.
- Validation: None.
- Destination: None.

Column: PERFORMANCE_ATTACHED_FLAG

- Value: Indicates if performance was attached to the line.
- Validation: None.
- Destination: None.

Column: ORG_ID

- Value: Do not populate.
- Validation: None.
- Destination: None.

Column: SECURITY_GROUP_ID

- Value: Do not populate.
- Validation: None.
- Destination: None.

Column: UTILIZATION_ID

- Value: For future use. Do not populate.
- Validation: None.
- Destination: None.

Column: TAX_CODE

- Value: Tax code to be applied to line. Specify AR Tax codes for Credit Memo, Chargeback and Debit Memo settlement and AP Tax codes for Check settlement.
- Validation: None.
- Destination: None.

Column: ITEM_ID

- Value: Product identifier from MTL_SYSTEM_ITEMS.inventory_item_id.
- Validation: None.
- Destination: None.

Column: ITEM_DESCRIPTION

- Value: Product name or description.
- Validation: None.
- Destination: None.

Column: QUANTITY

- Value: Quantity of product.
- Validation: None.
- Destination: None.

Column: QUANTITY_UOM

- Value: Unit of measure for the product.
- Validation: None.
- Destination: None.

Column: RATE

- Value: Product price per UOM.
- Validation: None.
- Destination: None.

Column: ACTIVITY_TYPE

- Value: Indicates the type of promotional activity (Campaign, Event or Offer).
- Validation: Must be a valid lookup_code in AMS_ACTIVITY_TYPE.
- Destination: None.
- ACTIVITY_ID .
- Value: Internal identifier for the activity.
- Validation: Checks if the activity exists in OMO.
- Destination: None.

Column: EARNINGS_ASSOCIATED_FLAG

- Value: Indicates if earnings are associated to the claim. Do not populate.
- Validation: None.
- Destination: None.

6.6.11 Setting Up Claim Ownership Assignment

Three methods are available for claim assignment:

- **Claim Territories:** Using the CRM Foundation Module Territory Manager, Trade Management can assign claims based on customer, geographical, and claim attributes. For more information, see [Section 6.4.5, "Setting Up Territory Manager for Trade Management"](#).
- **Assignment API:** Using this API, you can customize claim ownership assignment.
- **System Parameters:** If territories or the API are not used, the default owner in specified in System Parameters is used.

6.6.12 Team Access and Security

Each claim must be assigned to a team or group. These are created in the CRM Foundation Resource Manager module. After the team or group is created, they can be added to a claim.

- **Groups:** Every time a change is made, run the **AMS - Group Access Refresh** Program to update the group information.
- **Teams:** Every time a change is made, run the **AMS - Team Access Refresh** Program to update the team definitions.

If teams or groups are frequently changed, you can schedule these two programs to run on a regular basis.

Table 6–12 Team Access and Security

#	Team Member	Access
1	Members in the Group specified in the profile option AMS: Admin Group	Update all fields: ■ Excluding fields locked by the system out-of-the-box. ■ Including fields locked by locking rules.

Table 6–12 Team Access and Security

#	Team Member	Access
2	Claim owner and team members	Update all fields: ■ Excluding fields locked by system out-of-the-box. ■ Excluding fields locked by locking rules.
3	Task assignees	Update tasks from calendar or task list; view report of a claim.
4	All other users in the same operating unit as the claim	Access level is determined by the profile option AMS: Update Claim Access. The two levels allowed are: ■ Update access excluding ability to update owner fields, fields locked by the system out-of-the-box, and fields locked by locking rules. ■ View access of claims only.
5	All other users in different operating units from claim.	No access and no view. Claims are org-striped

6.6.13 Setting Up Discoverer

Discoverer is a tool used for querying, reporting, analysis, and web publishing. With the appropriate security access, users can view information stored in their database for various activities. They can build reports and graphs to dissect the information.

For TM purposes, follow the procedures in these section to set up Discoverer.

- [Section 6.6.13.1, "Setting Up User Security and Privileges"](#)
- [Section 6.6.13.2, "Customizing Business Areas"](#)

6.6.13.1 Setting Up User Security and Privileges

The steps below incorporate an example where the TM user is added so that these individuals can view the Inventory Business Area. The user name and responsibility for this example is MKTMGR and Oracle Trade Management User respectively.

Prerequisite

Oracle Discoverer is properly implemented.

Steps

1. Log in to Discoverer Administration version.
2. Select Open.
3. Select the business areas you want to edit.
In this example, check Inventory and Inventory Value Added.
4. Select Finish.
5. From the Tools menu, select Security to set up user security.
This setup gives your user access to the User Edition of Discoverer for certain business areas.
6. Select a Business Area.
In this example, select the User > Business Area tab.
You can use either the Business Area > User tab, or the User > Business Area tab.
7. Open the User/Resp drop-down list, and select a user.
In this example, select MKTMGR.
8. From the Available Business Area, select the business areas that you want to grant access to.
In this example, select Inventory and Inventory Value Added.
9. Select the > button.
Your selections display in the selected business areas on the left.
10. Select Apply.
11. From the User/Resp drop-down, select a user responsibility.
In this example, select Oracle Trade Management User.
12. From the Available Business Area, select the same business areas for the user responsibility that you selected for the user.
In this example, select Inventory and Inventory Value Added.
13. Click the > button.

Your selections display in the selected business areas on the left.

14. Select Apply.

15. Select OK.

16. From the Tools menu, select Privileges.

You will now give your user access to the Admin Edition. You can use either the Privileges tab, or the User/Role tab. In this example, use the Privileges tab.

17. Make sure that all boxes for Show privileges for User and Show privileges for Responsibility are checked.

18. Open the drop-down list and select MKTMGR.

This user already has privileges for User Editing. The Schedule Workbook option is not checked, and no demos are currently planned for this function for this user. Select the check box if you would like to schedule a demo.

19. Check Administration.

20. Select all five boxes under Administration.

21. Select Apply.

Check that the boxes for Show privileges for User and Show privileges for Responsibility are checked.

22. Open the drop-down list and select Oracle Trade Management User.

23. Select all of the boxes for Administration and User Edition.

24. Select Apply.

25. Select OK.

You must exit the Discoverer Administration Edition for these changes to take effect.

6.6.13.2 Customizing Business Areas

To customize business areas, follow the steps below.

Prerequisite

Oracle Discoverer is properly implemented.

Steps

1. Log in to the Discoverer Administration version.
2. Navigate to the Oracle Marketing business area.
3. From the Insert menu, select Folder From Database.
4. Select Next.
5. Assuming data needed is in APPS, check APPS user.
6. Select Next.
7. Click + to expand APPS.
All the tables and views for this user will load.
8. Highlight the views you want.
9. Select the > button to display the views in the Selected window.
10. Select Next.
11. Change the Default aggregate on datapoints to Details.
12. Select Finish.

A Loading status window is displayed. It may take a few moments for loading to finish. Your changes appear at the bottom of the Oracle Marketing business area.

6.6.14 Implementing a Claim Settlement Workflow

TM uses Oracle Workflow to control the sequence of events and notifications that occur when settling claims. The following sections provide:

- Detailed information about *AMS: Claim Settlement* workflow process that is seeded with TM. For details see:
 - [Section 6.6.14.1, "Overview of the AMS:Claim Settlement Workflow Process"](#).
- Instructions on configuring the AMS: Claim Settlement workflow process to extend the settlement process for any non-seeded payment methods your organization requires. For details see:
 - [Section 6.6.14.2, "Claim Generic Settlement Process"](#)
 - [Section 6.6.14.3, "Claim Settlement Seeded and Non-Seeded Processes"](#)
 - [Section 6.6.14.4, "Claim Settlement Process Definitions"](#)

- [Section 6.6.14.5, "Receivable Settlement Actions Definition"](#)
- [Section 6.6.14.6, "Receivables Document Correction Process"](#)
- [Section 6.6.14.7, "Non-Seeded Settlement Process Definitions"](#)

For information on the implementation and setup of Oracle Workflow, refer to the *Oracle Workflow Implementation Guide*.

6.6.14.1 Overview of the AMS:Claim Settlement Workflow Process

In TM, the settlement process is initiated when a user changes the following claim attributes:

- **Settlement method:** Select applicable settlement methods for a claim
- **Status:** Change claim status to closed.

The claim settlement workflow process is invoked as follows:

- If the value of profile *AMS : Automate Deduction/Overpayment Settlement* is set to No, the claim settlement workflow process is invoked if the user tries to settle deductions or overpayments by a settlement method related to Oracle AR.
- For non-transaction related deductions, the write-off settlement process is not automated in 11.5.9 release. Therefore, if a user chooses write-off to settle a claim, the claim settlement workflow process is invoked.
- For credit memo invoice settlements, the claim settlement workflow is invoked in the following cases:
 - If more than one invoice is defined on the Claim Line page, the user must manually create the credit memos for those invoices in AR.
 - For non transaction-related deductions, if the invoice was applied on multiple receipts in AR, claim settlement workflow is invoked. The user must manually create the credit memo in AR.
 - For both transaction-related and non transaction-related deductions, if the invoice defined in the claim line was not applied on the receipt for which the deduction was created, the claim settlement workflow is invoked. The user must verify the claim information and create a credit memo in AR to close the claim.
- If the profile value of *AMS: Driving Accrual Account during Claim Settlement* is Yes, when the user settles a claim by changing the claim status to Closed, the claim status becomes Pending Close immediately and the claim settlement workflow is invoked. The GL entries and payment creation process are put into

background processing. The user must run the Workflow Background Engine concurrent program to proceed with the settlement workflow.

6.6.14.2 Claim Generic Settlement Process

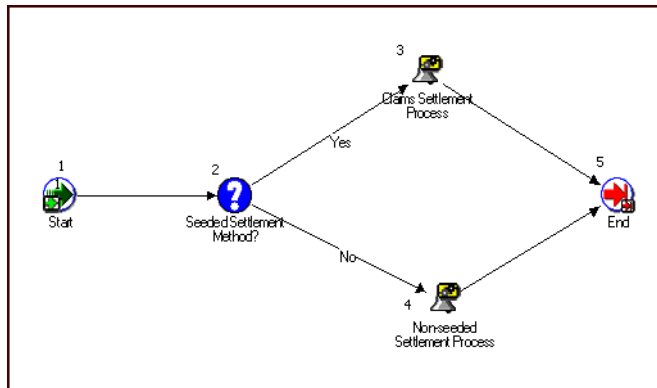
Claim Generic Settlement Process is used to verify whether or not a settlement method is seeded. It is associated with the following sub-processes:

- Claim Settlement Process (Node 3)
- Non-Seeded Settlement Process (Node 4)

Start (Node 1): This activity marks the start of a process and does not perform any action.

Seeded Settlement Method (Node 2): This activity is used to verify whether or not the settlement method is seeded. It also sets the item attribute Settlement Type to ADHOC if the settlement method is not seeded. The resulting type for this activity can be Yes or No.

Figure 6–3 Generic Claim Settlement Definition



6.6.14.3 Claim Settlement Seeded and Non-Seeded Processes

- The Claim Settlement Process (Seeded Subprocess - Node 3)

Can be a running, stand-alone process. It handles all of the settlement methods related to AR. See [Section 6.6.14.1, "Overview of the AMS:Claim Settlement Workflow Process"](#) for more information.

- Claim Non-Seeded Settlement Process Configurable Subprocess (Node 4)

Claim non-seeded settlement process is not a stand-alone process. It handles the settlement process for non-seeded payment methods. You can extend the existing workflow definition and customize it to meet your business needs.

- End (Node 5)

Marks the end of a process and does not perform any action.

6.6.14.4 Claim Settlement Process Definitions

The claim settlement process workflow is the major workflow used to handle non-automated settlement processes in Trade Management. Several scenarios can initiate this workflow. See [Section 6.6.14.1, "Overview of the AMS:Claim Settlement Workflow Process"](#) for more information.

Two associated subprocesses are inside the claim settlement process:

- Receivable Settlement Action (Node 10)
- Receivable Document Correction (Node 14)

Table 6–13 Claim Generic Settlement Activity

Activity	Result Type
Promotional Claim	Yes/No
Create GL Entries	Success/Error
Check Claim Class	Claim/Deduction
Create Payment	Success/Error
Reset Claim Status	N/A
Prepare Receivable instructions	Yes/No
Update Settlement Document	Success/Error
Additional Information requested from claims	N/A
Close Claim Settlement	N/A
Incomplete Claim	N/A

Table 6–14 Claim Generic Settlement: Notification

Notification	Message	Performer
Notify Claim Owner of Error (Node 6)	Settlement Error	Claim Owner
Claim Settlement Rejection/Cancellation (Node 9)	Unresolved Claim Message	Receivable Role
Additional Information Requested from claims (Node 11)	Additional Information	Claim Owner

- **Start (Node 1)**
Marks the start of a process and does not perform any action.
- **Promotional Claim (Node 2)**
Identifies the claim as promotional or non-promotional. The result type of this activity is Yes or No.
- **Create GL Entries (Node 3)**
Creates all accrual GL entries for all promotional claims. The result type of this activity is Success or Error.
- **Check Claim Class (Node 4)**
Checks the claim class. The result type of this function is Claim or Deduction.
- **Create Payment (Node 5)**
Creates payment for promotional claims. The result of this function is Success or Error.
- **Reset Claim Status (Node 7)**
Reverts claim status from Pending Close to Open if an error occurs. The claim amount settled is reverted back to amount remaining.
- **Prepare Receivables Instruction (Node 8)**
Sets the defaults for all item attributes related to claim settlement. These attribute values are included in the notification sent to the Receivables role to create payment.
- **Update Settlement Documents (Node 12)**

Once the Receivables role replays the notification with Receivables Transaction Number, the result type is Request Processed. The workflow continues to the Update Settlement Document activity. Internally, this function verifies any of the five transaction numbers entered by the Receivables role, and sets the corresponding Transaction Id.

The Transaction Number could be Adjustment Write-Off Number for deductions settled by a write-off. If any of the five transaction numbers is not valid in AR, the value is set to item attribute, Error Transaction Number1-5. If all of the transaction numbers are valid, claim settlement docs is populated with the payment information.

- Close Claim Settlement (Node 13)
Updates the claim status to Closed, and payment status to Paid.
- Incomplete Claim (Node 15)
Sets the claim payment status to Incomplete.
- End (Node 16)
Marks the end of a process and does not perform any action.

6.6.14.5 Receivable Settlement Actions Definition

Receivable Settlement Actions (Node 10) is a workflow process that is associated with the Claim Settlement Workflow process. It cannot be run as a stand-alone process.

This process is initiated when item attributes are properly set from the Prepare Receivables Settlement action.

Once the Receivable Settlement Actions process is initiated, a settlement notification called Instruction for Settling Claims to Receivable Role is sent to the Receivables user and the process waits for a response. A time out value is set by the settlement workflow. A workflow background engine must be set up to handle time out notification activities.

If the original notification exceeds the settlement time out value, the workflow engine sends another notification called Instruction for Settling Claim - Reminder to the Receivables user. The result type of the notification sent to the Receivables user is Require More Information or Request Proceed.

6.6.14.6 Receivables Document Correction Process

Receivables Document Correction (Node 14) is a workflow process that is associated with the Claim Settlement Workflow process. It cannot be run as a stand-alone process. This process is initiated when Transaction Number1-5 item attributes are identified as invalid by Update Settlement Documents (Node 12).

Invalid transaction numbers are put into item attribute Error Transaction Number1-5. Once the Receivables Document Correction process is initiated, a settlement notification called Transaction Correction is sent to the Receivables user and waits for a response. A time out value is set by the settlement workflow. A workflow background engine must be set up to handle time out notification activities.

If the original notification exceeds the reminder time out value, the workflow engine sends another notification called Transaction Correction - Reminder to the Receivables user. The result type of the notification sent to the Receivables User should be Corrected.

6.6.14.7 Non-Seeded Settlement Process Definitions

The purpose of the Claim Non-Seeded Settlement process is to provide a general settlement workflow process definition for users. It can be customized to meet your business needs.

One associated subprocess, called Close Settlement Process (Node 6), is inside Claim Non-Seeded Settlement Process.

Table 6–15 Claim Generic Settlement Activity

Activity	Result Type	Allow Customization
Complete Settlement Document (Node 2)	N/A	Yes
Create Settlement Document (Node 3)	Success/Error	No
Revise Settlement Document (Node 4)	N/A	Yes
Loop Counter (Node 5)	Loop/Exit	Yes

- **Start (Node 1):**
This Start activity marks the start of a process and does not perform any action.
- Complete Settlement Documents (Node 2)

Can be customized or overwritten. The customized function must be populated with the following item attributes. By setting these attribute, the function Write Settlement Doc will take these attribute values and write into the OZF_SETTLEMENT_DOCS table.

Table 6–16 Payment Detail Item Attributes

Attribute (Internal Name)	Data Type	Table Field	Validation
Transaction Identifier 1 (AMS_TRX_ID_1)	NUMBER	OZF_SETTLEMENT_DOCS_ALL. settlement_id	
Transaction Type 1 (AMS_TRX_TYPE_1)	VARCHAR2(30)	OZF_SETTLEMENT_DOCS_ALL. settlement_type	Status Code should come from AMS_LOOKUPS where Lookup Type is AMS_OBJECT_CLASS. Possible values include: INVOICE, CM, DM, CB, ORDER, PCHO, TP_ORDER
Transaction Number 1 (AMS_TRX_NUMBER_1)	VARCHAR2(30)	OZF_SETTLEMENT_DOCS_ALL. settlement_number	
Transaction Amount 1 (AMS_TRX_AMOUNT_1)	NUMBER	OZF_SETTLEMENT_DOCS_ALL. settlement_amount	Currently, for non-seeded settlement process, there is no validation to check that the total of settlement amount needs to be equal to claim amount. If user want to keep this validation true for non-seeded payment method also, user needs to write its own validation.
Transaction Date 1 (AMS_TRX_DATE_1)	DATE	OZF_SETTLEMENT_DOCS_ALL. settlement_date	
Transaction Status 1 (AMS_TRX_STATUS_1)	VARCHAR2(30)	OZF_SETTLEMENT_DOCS_ALL. status_code	Status Code should come from AMS_LOOKUPS where Lookup Type is AMS_PAYMENT_STATUS. Possible values include: IMCOMPLETE, INTERFACED, PAID, PENDING

- Create Settlement Documents (Node 3)

Cannot be customized or overwritten. Internally, this activity takes the item attributes of payment detail (refer to Table - Payment Detail Item Attributes) and populates the Settlement Doc table. If no errors occur, it passes the Success result type and continues through the next subprocess, Close Claim.

If an error occurs, it returns the Error result type, and the workflow proceeds with the Revise Settlement Documents activity.

- Revise Settlement Documents (Node 4)

Cannot be customized or overwritten. You must create an API to handle instances where the payment detail item attributes are not correct.

- Loop Counter (Node 5)

The Loop Counter is a standard workflow activity with an activity attribute called Loop Limit. The transition path from the Create Settlement Document activity to the Loop Counter activity goes in loop patch until the it exceeds the number defined in Loop Limit. The value of Loop Limit attribute is starting with 0 which means there is only one row of payment detail in settlement.

- End (Node 7)

Marks the end of a process and does not perform any action. This End activity calls standard PL/SQL procedure called WF_STANDARD.NOOP.

- Close Settlement (Node 6)

Cannot be run as a stand-alone process. Close settlement should be initiated only when the Create Settlement Document activity is successfully completed. (Refer to Create Settlement Document Node 3 for more information.)

Once Close Settlement is stated, it goes through the Close Claim Settlement activity. Claim status is changed to Closed and payment status to Paid.

If an error occurs, it returns the Error result type and calls the Reset Claim Status activity. The claim status is changed to Open.

6.6.15 Setting Up Claims Aging View

Provides a summary of claim and deduction amounts by customer and days due. To implement the Claims Aging View, you must:

- Define the aging bucket in AR. For more information see [Section 6.4.2, "Setting Up Oracle Receivables for Trade Management"](#).

- Run the **AMS-TM: Populate Claims Aging** concurrent process.

6.7 Implementing Budgets

For TM, there are two types of budgets:

- **Fixed Budgets:** A fixed budget is a pool of money with a value greater than zero. This value is used to fund sales, marketing and partnering activities. Fixed budgets can be defined for different customer and product attributes. They are different from fully accrued budgets in that the latter starts at zero and increases based on customer sales.
- **Fully Accrued Budgets:** Fully accrued budgets are also called live funds. Multiple accrual parameters can be defined, for example, accrue 3% for product X and 5% for product Y.

Implementation tasks for budgets must be complete prior to performing any administrative task. How budgets are implemented will vary depending on business requirements.

Prior to implementing budgets for TM, mandatory dependencies for budgets must be completed. For more information, see [Section 2.1, "Mandatory Dependency Overview"](#).

To implement budgets for TM, follow the procedures in these sections:

- [Section 6.7.1, "Setting System Profiles for Budgets"](#)
- [Section 6.7.2, "Creating and Verifying Lookups for Budgets"](#)
- [Section 6.7.3, "Running Concurrent Programs for Budgets"](#)

6.7.1 Setting System Profiles for Budgets

To implement budgets for TM set the profiles below:

Table 6–17 Profile Options for Budgets

Option	Required	Level	Setting	Effect/Limitation
AMS : Show GL Accounts On Screen	Yes	Site User	Yes/No	Default is Yes. This determines if GL account numbers and dates are displayed on the following screens: ■ System Parameters ■ Budget Category Setup ■ Budgets ■ Claim Type Setup ■ GL Date on Claim Settlement
AMS : Default Budget for a Person	Yes	Site Appl Resp User	Choose a budget name from the list of available budgets	During budget request for all objects, users may decide to source from a Budget or from a Person. When sourcing is made to a person, the system will automatically default the budget name specified on this profile on to the budget request. Users will be able to change it on screen.
AMS : Source from Parent Object	Yes	Site	Yes/No	This applies to the following objects: ■ Offers ■ Campaign Schedule ■ Event Schedule If set to Yes, objects may only source from their parent objects. For example, for an offer and a campaign schedule, the parent is a campaign; for an Event schedule, the parent may be an Event or a campaign. If set to No the schedule sources funds directly from a budget.

Table 6–17 Profile Options for Budgets

Option	Required	Level	Setting	Effect/Limitation
AMS : Allow Recalculation of Committed Budget	No	Site	Yes/No	Re-Calculated Committed is an option to re-calculate the necessary funding level based on the actual sales performance of a promotion (i.e. offer). Funds can be increased or decreased. If the promotion performs well, funding can be automatically increased, and vice versa. If set to Yes the concurrent process (for recalculate commit) will perform re-calculation of offers' committed amounts. If set to No re-calculation will not be performed. Users are still able to see the Re-Calculated Committed budget column, it will simply be equal the Committed column.
AMS : Default Period in Days for recalculating committed budget	No	Site Appl Resp User	Enter any integer (for number of days)	This profile determines how often updates to Re-Calculated Committed are performed. Enter any number greater than or equal to one. For example: ■ If set to 1, Re-Calculated Committed change after 1 day. ■ If set to 2, Re-Calculated Committed change after 2 days.
AMS : Allow committed budget to exceed total budget	No	Site Appl Resp User	Yes/No	If set to Yes, the committed amount for a budget can exceed its total budget amount. Set it to yes if you intend to use "budget" for initial sourcing but do not want to impose strict control over its usage. In such cases, the committed amount serves as an estimate for how much you will spend. Using this profile value, a budget may become negative. For example, there is more money spent/utilized than there is available. If set to No, the committed amount may not exceed the total budget amount. Set to no if you intend to use budget not just for sorting but also for imposing financial control over budgetary usage.

Table 6–17 Profile Options for Budgets

Option	Required	Level	Setting	Effect/Limitation
AMS : Validate Market and Product Eligibility Between Object and Budget	No	Site	Yes/No	Default value is No. If set to Yes, the product and marketing eligibility of an offer must fall within the targets of the budget. The eligibilities of a budget must include those of an offer. Even if different parameters are used for defining these eligibilities (e.g. budget uses Territories, but offer uses Customer), the validation procedure can still decide whether the offer falls within budget (e.g. budget says “US West” territory, offer says “Business World”, the procedure will figure out, based on the definition of the US West territory, whether it includes the customer Business World in it). Validation happens at the same time for both market and product eligibilities. In other words, if a budget is created for “US West” region and Toy products, an offer is created for a customer in the “US West” region but for the Games products, validation will fail and the offer will not be able to get money from the budget.
AMS : Default Cust View	Optional	Site Appl Resp User	Yes/No	Default value is No. If set to Yes, a user can see the Budget Customer View from the Budget summary page.
AMS : Universal Currency	Yes	Site	Choose any valid currency from a list of available currencies	This profile determines the currency for the rollup view. It allows the rollup view of a budget to display correctly by converting all entries to a single currency. Different users will, however, be able to see the Rollup View in different currencies based on the user level profile option JTF_PROFILE_DEFAULT_CURRENCY. (In other words, the universal currency profile is simply for storage in the background). Once set the profile should not be changed.
AMS: Budget has Grace Period	No	Site Appl Resp User	Yes/No	Yes indicates that budgets can have grace periods.

Table 6–17 Profile Options for Budgets

Option	Required	Level	Setting	Effect/Limitation
AMS : Budget Adjustment Grace Period in Days	No	Site Appl Resp User	Enter any integer (for number of days)	Reconciliation is a way to return the following money at the completion of an offer: ■ Adjusts previously committed, but un-utilized funds - transferring them from the Committed column to the Available column (“Reconcile Un-Utilized”). ■ Adjusts previously utilized, but un-paid funds, thus adjusting the Utilized column accordingly as well as transferring it from the Committed column to the Available column (“Reconcile Un-Utilized and Un-Paid Earnings”). Budget reconciliation may be performed manually or automatically. ■ If automatic: The “AMS-TM: Release Committed Budget Amount After Grace Period concurrent program is used to reconcile budgets. This program waits before reconciling the sourced budgets of an object after the closing date of the object. ■ If manual: The offer is evaluated on a case by case basis. Use automatic if you would like to systematically reconcile the budgets.
AMS : Price Different Budget	No	Site Appl Resp User	Choose a budget from a list of available budgets	This is used for accruals created by the AMS-TM: Chargeback Accruals concurrent process (which do not have any budgets assigned). The program imports sell-through sales data into TM, often for the purpose of forecasting or creating promotional accruals for indirect customers.

Table 6–17 Profile Options for Budgets

Option	Required	Level	Setting	Effect/Limitation
AMS : Default Partner Budget	No	Site Appl Resp User	Choose a budget name from the list of available budgets	Default budget for a partner
AMS : Default value for incompatibility group	No	Site Appl Resp User	Choose an incompatibility group from a list of available incompatibility groups set up in Advanced Pricing.	Incompatibility Group is setup Advanced Pricing, it determines how promotions will be grouped together and which ones will be applied together with other promotions. Being that a fully accrued budget creates an offer in the background, and being that the offer will by default have this incompatibility group, this concerns a fully accrued budget. Users can change this defaulted value while setting up the fully accrued budget.
AMS: Cut Off Percentage for Approval	No	Site	Enter any number (for percentage)	This determines what percentage of the estimated budget amount an object must secure in actual funding before the object can go active. For example, if you enter 100, it means 100%. An offer's estimated budget amount is \$10K, meaning that it is estimated that this offer must get budget approved for \$10K before the offer can go active.

6.7.2 Creating and Verifying Lookups for Budgets

When implementing budgets for TM, set or verify the following lookups.

Table 6–18 Lookups for Budgets

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. This lookup is the Available Type values for creating a budget. Changing the meaning of this lookup will change the display of these values on the budget creation screen. For example, you may change “Fully Accrued” to “Live Funds”, in this cae, in the screen you will see that while creating a budget and selecting a type.
AMS_ACCRUAL_BASIS	System	Customer Sales	Custom Sales This lookup is the value for Fully Accrued Budget’s Accrue To selection. Changing the meaning here will change the display of the values on screen.
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

Table 6–18 Lookups for Budgets

Key	Type	Values	Meanings
AMS_TRANSFER_TYPE	Extensible	Release Reserve Transfer Request Utilized	Release Reserve Transfer Request Utilized
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

Table 6–18 Lookups for Budgets

Key	Type	Values	Meanings
AMS_BUDGETSOURCE_STATUS	System	Approved Closed New Pending Pending_Validation Rejected	Approved Closed Planning Pending Pending Validation Rejected This lookup creates different statuses of a budget request. Pending Validation is newly added in this release and used for budget-offer validation purpose to inform users on screen that the validation is still going on.
AMS_OBJECT_CLASS	System	Order Order_line Invoice	Order Order Line Invoice
AMS_PRODUCT_LEVEL	System	Product Family	Product Product Family
AMS_VALUE_LIMIT	Extensible	Balance Committed Paid Planned Utilized	Balance Committed Paid Planned Utilized

Table 6–18 Lookups for Budgets

Key	Type	Values	Meanings
AMS_ADJUSTMENT_ TYPE	Extensible	Decrease_ Committed Decrease_ Comm_ Earned Decrease_ Earned Increase_ Committed Increase_ Committed_ Earned Request Standard Transfer	■ Decrease Committed Amount ■ Decrease Committed and Earned Amounts ■ Decrease Earned Amount ■ Increase Earned Amount ■ Increase Committed Amount ■ Increase Committed and Earned Amounts ■ Budget Request ■ Standard (Increase Earned) ■ Budget Transfer These Lookups are used for: ■ Manual budget adjustments: Decrease Committed, Decrease Committed and Earned, Decrease Earned, Increase Earned or called Standard. Changing the meaning of these will change the display of the values on the budget's Adjustment screen. ■ Budget request: Request ■ Budget transfer: Transfer ■ Systematic budget adjustments used for scan data offers: Increase Earned, Increase Committed and Earned).
AMS_ACCOUNTING_ METHOD	System	Accrual Cash_Basis	Accrual Cash Basis These Lookups are the available values for Accounting Methods in the System Parameters page. The majority of the time this will be selected as Accrual.

Table 6–18 Lookups for Budgets

Key	Type	Values	Meanings
AMS_ACCRUAL_PHASE	System	Accrual Volume	Accrual Per Order Cumulative Order Volume. These Lookups are the Available selections for Accrual Basis when defining a fully accrued Budget. Changing the meaning here will change the display of the values on screen. For example, you may change the meaning from “Cumulative Order Volume” to “Volume Offer”, and when you need to select this on a fully accrued budget, the value will be displayed as “Volume Offer”.
AMS_FUND_ALLOC_ACTION	System	Create_New_Budget Transfer_To_Budget	Create New Budget from this Allocation Add on to Existing Budget Hierarchy Lookup values here are the Available values for Budget Allocation purpose. Create New Budget from this Allocation means that the budget allocation will create sub-budgets; Add on to Existing Budget Hierarchy means that the allocation will simply add budget amounts to the existing sub-budgets. Changing the meaning here will change the display of these two Actions on the budget Allocation screen).
AMS_FUND_ALLOC_HIERTYPE	System	BUDGET_HIER TERRITORY	Budget Hierarchy Territory These Lookups are the Values used when allocating budget.
AMS_FUND_ALLOC_METHOD	System	Even Manual Prior_Sales_Total	Even Distribution Manual Prior Year Sales Total in Amount These Lookups are the Available values for budget Allocation Method.

Table 6–18 Lookups for Budgets

Key	Type	Values	Meanings
AMS_FUND_ALLOC_STATUS	System	Active Cancelled New Planned Rejected Submitted	Active Cancelled New Planned Rejected Submitted These Lookups are the Available values for budget Allocation statuses. This is different from budget status.
AMS_FUND_ALLOC_TYPE	System	Distributing Receiving	Distributing Receiving This Lookup is used for budget Allocation purpose. With top down bottoms up budgeting, both a user allocating/distributing the budget and a user receiving the allocation will see a budget worksheet. Distributing indicates the user is looking at an allocation he created; Receiving indicates the user is looking at an allocation he received. These values appear on the Allocation Summary screen and are not editable. Changing the meaning here will change the display of them.

Table 6–18 Lookups for Budgets

Key	Type	Values	Meanings
AMS_FUND_ALLOC_USERACTION	System	Approve_Allrecomm Approve_Allrequests Approve_Recomm Approve_Request Require_Resubmit	Approve All Recommended Approve All Requests Approve Recommended Approve Request Require to re-submit These Lookups are values used for the actions that users can take during the top down bottoms up budgeting process. Recommended amounts are the budget amounts recommended on a “top down” basis. Requested amounts are the budget amounts submitted on a “bottoms up” basis. After some rounds of edits, an allocator can then decide which budget numbers to approve, or if he wants to ask his child territories to re-submit their requests. The lookup values here are used for such actions.
AMS_TRANSFER_REASON	User	Sourcing	Initial Sourcing This Lookup determines the list of values available on any Budget Request screen.
AMS_UTILIZATION_TYPE	System	Accrual Adjustment Request Sales_Accrual Transfer Utilized	■ Accrual: Used to identify accruals. ■ Adjustment: Used for budget adjustments. ■ Budget Request: Used to identify budget requests. ■ Sales Accruals ■ Budget Transfer: Used to identify budget transfers. ■ Budget Utilized: Used to identify utilization; different from accrual in that this identifies either off invoice type of discount offers or campaign/offer’s cost postings to budget. These Lookups are the different “Type” values for the budget Committed and Utilized columns. Changing the meaning here will change the display of these values in the budget checkbooks and cells.

6.7.3 Running Concurrent Programs for Budgets

Run the following concurrent programs for budgets:

Table 6–19 Budget Concurrent Programs

Concurrent Manager	Required	Description
AMS-TM Utilize Lumpsum Offers	Yes	If a lump sum offer's start date is in the future, the offer has already been approved for budgets, and is active, this program is run to update the budget's Utilized volume. In the case when the Offer is active on the date when Offer was created, then the budget utilization will be updated immediately not by this program.
AMS-TM: Release Committed Budget Amount After Grace Period	Yes	Reconciliation is a way to return the following money at the end of an offer: - Adjusts previously committed, but un-utilized funds, transferring them from the Committed column to the Available column ("Reconcile Un-Utilized"). - Adjusts previously utilized, but un-paid funds, thus adjusting the Utilized column accordingly as well as transferring it from the Committed column to the Available column ("Reconcile Un-Utilized and Un-Paid Earnings"). Budget reconciliation may be performed manually on each object such as an offer, or automatically via this concurrent process. Parameters: p_object_type (Object Type, for example, CAMP, OFFR, EVEH)
AMS-TM: Validate Budget Thresholds	Yes	Threshold alerts are designed to help users monitor their budgets' activities. Different rules can be established to send out alert notifications to inform users of fund usage, depletion levels, and monitoring over spending or under spending. A threshold contains a set of rules. After being set up, it is assigned to a budget. Alerting budget owners to the danger of spending exceeding budget norms can help avoid over-spending. This concurrent process is run to monitor the different budgets and see if they meet the rules and definitions of their budget thresholds. If it does, it automatically sends a workflow notification to the budget owner. Parameters: None

Concurrent Manager	Required	Description
AMS-TM: Import Territory Hierarchy	Yes	This concurrent program uploads the hierarchy data from jtf_territories to AMS schema used for budget allocation to that territory hierarchy. It is also used for defining budget hierarchy for a fully accrued budget. The concurrent program expects a hierarchy id meaning which particular hierarchy the user wants to import. Parameters: Hierarchy Id These are represented by all the root territories under Oracle Trade Management in the Territory Manager module.
AMS-TM: Perform Recalculated Commitment for Offers	No	Re-Calculated Committed is an option to re-calculate the necessary funding level based on the actual sales performance of a promotion. Funds can be increased or decreased. If the promotion performs well, funding can be automatically increased, and vice versa. This program performs the re-calculation. No parameters
AMS - Team Access Refresh Program	No	This program is used for all objects with Teams. When any team changes, this program needs to be run to accurately reflect who the team members are.
AMS-TM: Funds Accrual Engine	Yes	This is an engine that extracts all accrual and discount information from sales orders executed at all ordering channels. The following are the categories of Events handled by this engine: ■ Calculates budget utilization and earnings based on ship confirmed orders. ■ Handles a return orders' impact on budget utilization and earnings. ■ For fully accrued type of budgets with accrue to is 'customer', it updates Budget and Utilized columns with the accrued amount. ■ For budgets with accrue to 'Sales', it updates the Budget column but does not update the Committed and Utilized columns. ■ For Volume offer adjustments, it calculates the accruals for each sales order and makes accrual adjustments that are necessary as a result of volume offers. ■ For accrual rates that are adjusted retroactively, it creates the adjustments based on sales order information in the past. Parameters: p_run_exception. Set to Y to run Order Management Except Queue.

Concurrent Manager	Required	Description
AMS: Transfer to General Ledger	No	This program is run to transfer the accounting entries created by claims/accruals into GL accounting tables. The accounting entries are transferred from TM's interface tables to GL's interface tables. There is an option to automatically create the entries as Journals using Journal Import upon arriving at GL. After the entries are turned into Journals, they need to be "Posted" to complete the GL process. Parameters: ■ Set Of Books: Primary set of books ■ Batch Name: Name of batch for transfer. This is optional. ■ From Date: Transfer entries created starting from this date. ■ To Date: Transfers entries created ending this date. ■ Journal Category: All, fixed budgets (for promotional accruals created for offers funded by fixed budgets), Accrual budgets (for promotional accruals created by a fully accrued budget) and Settlement (for promotional claims). ■ Validate Accounts: Yes/No. Determines whether GL accounts will be validated during transfer. ■ Transfer to GL Interface: In Detail (each accrual record on its own), Summarize by Accounting Date (grouping accrual records by accounting date during transfer), Summarize by Accounting Period (grouping accrual records by Accounting Period during transfer). ■ Submit Journal Import: Yes/No. Determines whether Journal Import will be run when the entry gets transferred to GL; if Yes, a journal will be created for an entry; if No, the entries sit in GL's interface tables until a GL user runs the Journal Import program in GL.

Concurrent Manager	Required	Description
AMS-TM: Chargeback Accrual	No	Used to import the sales data and accrual information that exists in the OZF_CHARGEBACK_INT_ALL interface table. This table is used for taking feeds of Third Party Accrual data.
AMS-TM: Chargeback Purge	No	This program purges the entries in the OZF_CHARGEBACK_INT_ALL interface table. No parameter.
AMS-TM: Refresh Materialized View for Base Sales and Actual Sales	No	This program will fetch sales orders and sum them up to provide the historical (or base) sales data in budget Allocation based on prior year sales. This concurrent manager program takes data from Order Management and loads the ams_base_sales_mv and ams_actual_sales_mv materialized views. Single parameter: Number of processors. The default value is assigned according to the machine. It is recommended that you accept the default value.

Table 6–20 Budget Concurrent Programs

6.8 Administering Budgets

The way in which you administrate the budgets component of TM depends on the requirements of your business. Therefore, only implement the functionality below as needed.

To Administrate Budget Management follow the procedures below:

- [Section 6.8.1, "Setting Up Budget Security"](#)
- [Section 6.8.2, "Setting Up Budget Adjustment Types"](#)
- [Section 6.8.3, "Setting Up Budget Thresholds"](#)
- [Section 6.8.4, "Setting Up Budget Categories"](#)
- [Section 6.8.5, "Budget System Status and User Status"](#)
- [Section 6.8.6, "Setting Up Budget Approval Rules"](#)
- [Section 6.8.7, "Setting Up Business Units for Budgets"](#)
- [Section 6.8.8, "Setting Up Budget-Offer Validation"](#)
- [Section 6.8.9, "Setting Up Multiple Currencies for Budget"](#)

- [Section 6.8.10, "Setting Up Budget Allocation Based on Prior Year Sales"](#)
- [Section 6.8.11, "Setting Up Top Down Bottoms Up Budgeting"](#)
- [Section 6.8.12, "Setting Up Budget Requests"](#)
- [Section 6.8.13, "Funds Accrual Engine Overview"](#)
- [Section 6.8.14, "Setting Up Recalculate Committed Budgets"](#)
- [Section 6.8.15, "Setting Up Budget Reconciliation"](#)
- [Section 6.8.16, "Setting Up Budget Roll-up Views"](#)
- [Section 6.8.17, "Setting Up Third Party Accrual API Import"](#)

6.8.1 Setting Up Budget Security

Not every user can update or view a budget. The table below explains the different access levels for budgets.

Table 6–21 Budget Security Levels

#Security Level Number	User Name	Security Level Access
1	AMS: Admin Group	Update all fields: ■ Excluding those locked by system ■ Including those locked by locking rules
2	Owner	Update all fields: ■ Including Owner field ■ Including adding Team ■ Excluding those locked by system ■ Excluding those locked by locking rules
3	Team members with Edit Metrics	Update all fields: ■ Excluding Owner field ■ Including adding Team members ■ Excluding those locked by system ■ Excluding those locked by locking rules

Table 6–21 Budget Security Levels

#Security Level Number	User Name	Security Level Access
4	Team members without Edit Metrics	View budget only
5	Everyone else	No access, no view

Based on the responsibility of the user creating the budget, a budget is created with an organization ID (i.e. operating unit ID) stored. This does not drive update or view access to a budget, as explained by the table above.

The “Oracle Marketing Super User” responsibility does not automatically get access to a budget. Whether a user with this responsibility can update or view a budget is still as explained by the table above. If the user does fall into one of the above access levels, he or she can update all fields including those locked by locking rules.

From any Budget Request screen, the list of values for available budgets displayed follows the security levels described above. In other words, a budget requestor will only be able to request money from budgets of which he is either an owner or a team member.

Unlike claims which are org-striped, budgets are not org-striped. They are, however, stored with the organization ID (according to the responsibility of the user who created the budget). Budget Utilization is org-striped.

The following table describes the various access levels of objects (such as offers, campaigns, Events) and as they relate to which users can access the Budget cue card with each object. Not everybody with access to an object will automatically have access to the Budget cue card or the Budget Request function.

Table 6–22 Object (Offer/Campaign/Event) - Security and Budget Security Levels

Number	User Name	Security Level Access
1	AMS: Admin Group	Update all fields: Excluding those locked by system Including those locked by locking rules

Table 6–22 Object (Offer/Campaign/Event) - Security and Budget Security Levels

Number	User Name	Security Level Access
2	Owner	Update all fields: ■ Including Owner field ■ Including adding Team members ■ Excluding those locked by system ■ Excluding those locked by locking rules
3	Team members with Edit Metrics	Update all fields: ■ Including adding Team members ■ Including Cost & Revenue Cue Card ■ Including Budget Cue Card ■ Excluding Owner field ■ Excluding those locked by system ■ Excluding those locked by locking rules
4	Team members without Edit Metrics	Update all fields: ■ Excluding adding Team members ■ Excluding Cost & Revenue Cue Card ■ Excluding Budget Cue Card ■ Excluding Owner field ■ Excluding those locked by system ■ Excluding those locked by locking rules
5	Everyone else, regardless of operating unit	View only

6.8.2 Setting Up Budget Adjustment Types

This enables users to make manual adjustments to their checkbooks. User are able to adjust earning previously committed to customers who have failed to meet agreed upon activities. This frees up funds from the committed column, allowing users to allocate the funds to other activities.

Adjustment types may be defined in advance and then used when making adjustments to budgets.

Prerequisite

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Budget > Adjustment Types.
3. Select Create.
4. Enter the following information:
 - **Start Date:** Date starting from which the adjustment type can be in use.
 - **End Date:** Date when the adjustment type stops being in use.
5. Select an Adjustment Type:
 - **Decrease Budget Commitments:** User can decrease a commitment if he or she has already committed for that activity. A validation is performed - budget commitments can be decreased only to the extent of the balance left after budget utilization. Negative commitments and earnings are not allowed.
 - **Decrease Budget Commitment and Utilization:** In addition to the above validation, earning validations listed below would also be performed. To post negative earning against a budget a positive earning must exist. If no earning exists for the budget, the user will receive an error message.
 - **Decrease Budget Utilization:** The above validation for decrease earning would be applicable in this case. Similar to decreasing both budget committed and utilized, this may be performed because a customer fails to meet the performance criteria of an offer.
 - **Increase Budget Utilization:** A user can increase earning against any budget.
6. Select Create.

6.8.3 Setting Up Budget Thresholds

Budget thresholds enable companies to:

- Set budget rules
- Send budget alert notifications

- Inform users of fund usage
- Inform user of depletion at various level

These rules and parameters defined in the budget threshold are assigned to a budget.

- **Threshold Example:** if a promotion has just started and has already used up 90% of a budget, more funds may need to be transferred in.
- **Threshold Rule Example:** A rule may be set up to send email alerts to budget owners when actual expenditure is $\geq 90\%$ of committed.

Budget thresholds can be based on the following amount types:

- Planned
- Committed
- Re-Calculated Committed
- Utilized
- Paid
- Budget balance (Available - Committed)

To set up a budget threshold, use the following procedure.

Prerequisite

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Budget > Thresholds.
3. Select Create.
4. Enter the following required information:
 - **Name:** Name the budget threshold. This will later be available on the budget's Details screen, Threshold list of values, to be assigned to a particular budget.
 - **Start and End Periods:** Optionally enter start and end periods. These are periods defined in the Accounting calendar. If values are selected here, they will limit the start and end dates that can be entered below.

- **Start Date:** The date starting from which the threshold can be in use.
 - **End Date:** The date when the threshold stops being in use.
 - **Owner:** Defaults to the user creating it. (For tracking purpose only, it has no other function.)
 - **Enabled:** Whether this threshold can be in use or not. This must be checked if you intend to use this threshold, regardless of what you enter for start date.
5. Select Create.
6. In the Threshold Rules section enter the following information:
- **Start Date:** The date starting from which the threshold line (one particular rule) will be in use
 - **End Date:** The date when the threshold line (one particular rule) stops being in use. Please see examples in the above section for using different Start and End dates on each threshold line.
7. Select Create.
8. Enter the following information:
- **Value Limit:**
 - Planned
 - Committed
 - Re-Calculated Committed
 - Utilized
 - Paid
 - Balance (Available - Committed)
 - **Operator:**
 - > = (greater than or equal to)
 - < = (less than or equal to)
 - = (equal to)
 - **Percent:** Enter any number for percent. (No need to enter% sign).

- **Off Baseline:**
 - Based on the Value Limit selected above, this list of values will dynamically change.
 - If the value limit is Planned, the Baseline value available is Budget
 - If the value limit is Committed or Re-Calculated Committed, the Baseline values available are Budget and Planned.
 - If the value limit is Balance, the Baseline value available is Budget
 - If the value limit is Utilized, the Baseline values available are Budget and Committed
 - If the value limit is Paid, the Baseline values available are Budget, Committed and Utilized
 - **Frequency:** Enter any number.
 - **Period Type:** Select Days, Weeks, Months, Quarters and Years. Together with Frequency, these define how often the budget owner will receive the notification within the Start and End dates of the line, once the threshold condition is met. If you enter Frequency = 2 and Period Type = Weeks, it means a budget owner will get a notification once every two weeks once the threshold condition becomes true, until the end date of the threshold line.
 - **Enabled:** Again, if you intend to use this threshold line, you must check this regardless of the Start and End dates.
9. Select Update to save your work.

6.8.4 Setting Up Budget Categories

Budget Categories serve three broad purposes.

- Classification
- Approval Rule Setups
- General Ledger account defaults for budgets

To create categories for budgets, use the following procedure.

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Category.
3. Select Create.
4. Select Created For = Budget.
5. Enter a Category Name.
6. Select a Parent Category if desired.
7. Select the Enabled checkbox to make the Category available.
8. Optionally enter a description.
9. Provide the following information:
 - **GL account codes for both the Sales/Expense/Charge Account and the 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 the Account Generator workflow process, and the account number 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.
10. Select Create.

6.8.5 Budget System Status and User Status

A budget goes through the following main system statuses:

- **Draft:** Amounts are entered but not approved
- **Pending Approval:** Being reviewed but needs approval to become active.
- **Active:** Has been activated and can be used to fund activities.

Approval rules are used to determine the route from Draft to Active. Approval rules are highly configurable and multiple ones can be created based on the budget's characteristics.

The following table lists budget statuses used in Trade Management and a description of each.

Table 6–23 Budget System Status

Status	Description
Draft	Budgets in draft status can be updated at any time in any way. Draft status may be updated to Pending Approval or Cancelled. It can also be updated to Active directly in case the budget owner is also the owner of the parent budget, and the parent budget is already Active.
Pending Approval	The budget has been submitted for and is awaiting approval. After all approvers have responded positively, a budget may become Active or On Hold. If approvers reject the budget it will become Rejected.
On Hold	On Hold is an interim status that is used when budget has already obtained approval, and is just not completely ready to be made active. At On Hold status, a user can then manually change it to Active or Closed.
Rejected	Budget approvers have rejected the budget. From Rejected, the status can be manually changed back to Draft.
Active	A budget that has been approved and is ready to fund various activities and promotions. From Active, the status can be changed to Closed and Cancelled.
Cancelled	Indicates the budget has been aborted. From Cancelled, the status can only be changed to Archived.

Table 6–23 Budget System Status

Status	Description
Archived	The budget can no longer be used. This cannot be changed to any other status.
Closed	From On Hold or Active, Budget status can be manually changed to Closed. It indicates that the budget has ended and is no longer available to fund activities and offers.

6.8.6 Setting Up Budget Approval Rules

Approval rules can be created to determine who gets to approve the budget and under what circumstances they can approve it. Approval rules for approving budget request/root budget request are evaluated based on the following:

- Business Unit = 6
- Organization = 5
- Approval Object Type = 4 (i.e. “Budget” for budgets purpose)
- Budget Category = 3
- Custom Setup = 1

The higher the number, the more important the parameter is in determining which approval rule will apply to a particular budget.

Prerequisite

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Approval Rule.
3. Change the value of Approval Rule for:
 - Select Root Budget Request if you are defining the rule for who gets to approve a budget and under what specific circumstances.
 - Select Budget Request if you are defining the rule for who gets to approve the object for the request for funding under specific circumstances.

The page refreshed and the Approval Type defaults to Budget.

4. Provide the following information:

- **Approval Rule Name:** Give a name for your approval rule
- **Start Date:** The date starting from which the approval rule will be in use
- **End Date:** The date when the approval rule stops being in use
- **Organization:** This displays a list of operating units
- **Budget Category:** Select the budget category that will fall into this approval rule
- **Setup Type:** custom setups created for budgets purpose.
- **Minimum Amount and Maximum Amount:** Define the range of budget amounts or budget request amounts that will fall into this approval rule
- **Description:** Optionally describe your approval rule

5. Select Create.

The page refreshes and an Approvers table displays. Using this table, define the people who will be approving the claim:

6. Enter the following information:

- **Order:** Enter any integers in ascending order.
- **Type:** This can be Function (for customization purpose), Role (defined for marketing and assigned to Resources), User.
- **User/Role:** Depending on the Type selected above, this may display a list of functions, roles or users
- **Start Date:** The date starting from which the approver is active. Within the range of the approval rule, each line can also have a start date and end date.
- **End Date:** The date when the approver stops being the approver.

7. Select Update to save your work.

6.8.7 Setting Up Business Units for Budgets

The list of values for the Business Unit field (used when creating a budget) comes from the Organizations defined in the HRMS application. When defining any internal organizations in HRMS, there is the ability to classify this organization with a "Type". One of the available Types is Business Unit. This Type generally exists for

classification purpose and has little function in HR or other ERP applications. In budgets, Type is used for:

- Classification
- Approval Rule Setup

Prerequisite

None

Steps

1. Log in to Oracle Forms with Human Resources responsibility.
2. Navigate to Work Structures > Organization > Define.
3. Select New to define a new organization, or query for a particular organization.
4. In the next window that appears, on the header, select Type = Business Unit.
5. This organization will then appear in the list of values for Business Unit in budgets.

6.8.8 Setting Up Budget-Offer Validation

Budget-Offer Validation validates that the market and product eligibilities of an offer fall within the targets of the budget. This ensures that funds set aside for specific customers and products are used appropriately.

To set up budget-offer validation, set the profile **AMS: Validate market and product eligibility between object and budget** to **Yes** at the site level.

If validation is set to **Yes**, and validation fails, an error message will be sent to the offer owner. The status of the offer will revert to Validation Failed.

6.8.9 Setting Up Multiple Currencies for Budget

Budgets can be created in multiple currencies. Although the budget may reflect multiple currencies - the GL postings use functional currency which is defined by the set of books defined in System Parameters. TM automatically does currency conversion based on the rates defined in the profile **AMS: Default Currency**.

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.

Currency conversion for each transaction is recorded based on the currency conversion type specified on the profile option **AMS: Currency Conversion Type**. This profile is set at the site level. In the budgets, you will also be able to see both the transaction currency and the functional currency amount.

For more information about profile options see [Section A.3, "Oracle Marketing System Profiles"](#).

6.8.10 Setting Up Budget Allocation Based on Prior Year Sales

Budget allocation enables a company to allocate money to each sales territory for the salespeople to spend. Allocation can be based on:

- **Even Distribution:** This is derived by dividing the total allocation amount by the number territories selected.
- **Manual:** Enters any number manually.
- **Prior Year Sales:** A proportionate split is calculated to allocate the money for the current year.

To set up budget allocation based on Prior Year Sales, run the **AMS-TM: Refresh Materialized View for Base Sales and Actual Sales** concurrent program. Budget allocation makes use of Territories set up in Territory Manager, so it is also necessary to import the territories for TM purposes.

- For more information about setting up Territories [Section 6.4.5, "Setting Up Territory Manager for Trade Management"](#).
- For more information about concurrent programs see [Section C, "Summary of Request Sets and Concurrent Manager Programs"](#).

6.8.11 Setting Up Top Down Bottoms Up Budgeting

Budget amounts allocated from management down to lower levels is called a **top-down budgeting process**. Budget amounts rolled up from lower levels to management, is called a **bottoms-up budgeting process**.

To implement top-down or bottoms-up budgeting:

- Allocate budget based on a specific criteria (for example, prior year sales).
- Accept inputs from lower levels.

TM enables you to automate the time-consuming budget process by facilitating communication between management and sales people at all levels in the sales hierarchy.

For more information on Top-down and Bottom-up budgets see the *Oracle Marketing User's Guide*.

6.8.12 Setting Up Budget Requests

To access Budget Request screen, you need to set up proper security access level for the users based on the rules in the above section "Setting Up Budget Security". For more information see [Section 6.8.1, "Setting Up Budget Security"](#).

In addition, define multiple Transfer Reasons to record the reasons for each request. To do so, extend the Lookup `AMS_TRANSFER_REASON`.

6.8.13 Funds Accrual Engine Overview

Funds Accrual Engine is a program that handles Accrual Management capabilities in TM.

This section contains the following subsections:

- [Section 6.8.13.1, "Funds Accrual Components"](#)
- [Section 6.8.13.2, "Logical Procedures for Accruing Funds"](#)

6.8.13.1 Funds Accrual Components

This engine enables you to calculate Budget Accrual Liability. All features listed below are implemented through the same concurrent process.

- Ability to calculate budget utilization and earnings based on ship confirmed orders.
- In case of Fully Accrued type of budgets with accruing to '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. For fixed budgets, budget earned column is update with the accrued amount.

- Ability to reconcile budget utilization and earnings when an order is cancelled. When an order is cancelled running the concurrent process would reconcile the already adjusted budget amount.
- Ability to reconcile budget utilization and earnings when an order is returned. When an order is returned running the concurrent process would reconcile the already adjusted budget amount.

6.8.13.2 Logical Procedures for Accruing Funds

In order to accrue funds, use the following procedures:

1. In TM, create an Active 'Fixed' Budget.
2. In TM, create a Offer.
3. In TM, source the Offer from the Active Budget.
4. In TM, activate the Offer (status of the Offer = Active).

6.8.14 Setting Up Recalculate Committed Budgets

This functionality re-calculates the funding level based on the sales performance of a promotion. Funds can be increased or decreased. If the promotion performs well, funding can be automatically increased, and vice versa. This ensures that funds do not run out for promotions that are performing well.

The committed amount determines the maximum of what the Utilized amount can be. The relationship is reversed for Re-Calculated Committed. If Re-Calculated Committed is implemented then the Utilized amount determines what Re-Calculated Committed amount should be.

- Re-Calculated committed amount can be higher or lower than committed amount
- Re-Calculated Committed amount can be higher or lower than total amount

Subsequent budget requests from offers will increase the committed amount of the budget - not the Re-Calculated Committed.

For example, Budget A has the following numbers:

- Total = \$10,000.
- Planned = \$0.
- Committed = \$5,000.
- Re-Calculated Committed = \$12,000.

- Utilized = \$6,000.

Offer A then requests money from Budget A. Offer A is for \$2,000. The user submits Offer A for budget approval for \$2,000 from Budget A. Offer's status is now at Pending Budget Approval. As a result, Budget A's numbers are updated as follows:

- Total = \$10,000.
- Planned = \$2,000.
- Committed = \$5,000.
- Re-Calculated Committed = \$12,000.
- Utilized = \$6,000.

Once Offer A's budget request is approved, Offer A has Active status. Budget A's numbers are updated as follows.

- Total = \$10,000.
- Planned = \$0.
- Committed = \$7,000.
- Re-Calculated Committed = \$12,000.
- Utilized = \$6,000.

To set up Re-Calculated Committed budgets, use the following procedure.

Prerequisites

None

Steps

1. Set **AMS-TM: Allow Recalculation of Committed Budget** to **Yes** at site level.
2. Set the profile **AMS: Default Period in Days for Recalculating Committed Budget**.

Enter any number = 1. This profile determines how often you would like to see Re-Calculated Committed change. For example:

- If set to 1, it means that you would like to see Re-Calculated Committed change after 1 day.
- If set to 2, it means that you would like to see Re-Calculated Committed change after 2 days.

- This number should be set to be less than or equal to the shortest offer duration in the system in order to get the most updated Re-Calculated Committed amount. For example, if the shortest offer in the system lasts for 6 days, but you set the profile here to 10. It means that you will not see Re-Calculated Committed reflect this particular offer's actual utilization until 4 days after the offer ends.
3. Run the concurrent program **AMS-TM: Perform Recalculated Commitment for Offers**.
- The lowest number of days for the AMS: Default Period in Days for Recalculating Committed Budget is 1, therefore, it does not make sense to schedule this program to run more than once per day.
 - **Example 1:**
 Offer A is committed for \$10,000 for 10 days from Day 1 to Day 10. It gives a 10% accrual on Product A which regularly sells for \$100.
 AMS-TM: Default Period in Days for Recalculating Committed Budget = 1.
 Average committed for Offer is therefore $\$10,000 / (10 / 1) = \$1,000$.
 The AMS-TM: Perform Recalculated Commitment for Offers program is scheduled to run once every day at 00:01 hour (1 minute after midnight).
 Day 1, a customer buys 120 units of Product A, total sales = $120 \times \$100 = \$12,000$. This customer gets Offer A, so the accrual calculated for him is $\$12,000 \times 10\% = \$1,200$. Assume budget utilization is updated immediately[3]. This increases budget utilization by \$1,200.
 Re-Calculated Committed amount does not change during Day 1. 1 minute after Day 1, the concurrent process runs as scheduled. Re-Calculated Committed is increased by $\$(1,200 - 1,000) = \$200$. This is shown as a "Re-Calculated Committed Increase" Adjustment of the budget. You will see this if you drill down into the Re-Calculated Committed number.
 In this example, even if the concurrent process was scheduled to run twice every day, the result is still the same. In other words, because AMS-TM: Default Period in Days for Recalculating Committed Budget = 1, the earliest Re-Calculated Committed will update is 1 second after midnight. So even if the process was run at 23:59 hour of Day 1, Re-Calculated Committed will not increase by \$200.
4. To View Re-Calculated Committed amount:
- a. Log in to Oracle Marketing

- b. Navigate to the Budget tab.
 - c. If this budget summary page does not have Re-Calculated Committed as one of the columns displayed, select the Personalize button.
 - d. Define your search criteria, and from the Available Column window, select Re-Calculated Committed and move it to the Display Column window. Name and save your search. Go back to the budget summary page, you will now see this column.
5. Save your work.

6.8.15 Setting Up Budget Reconciliation

Budget reconciliation is a way to return money at the end of an offer. It can be done manually or automatically.

- **Manual Reconciliation:** Using the Budget cue card's Reconcile button
- **Automatic Reconciliation:** Running AMS-TM: Release Committed Budget Amount After Grace Period program.

To setup budget reconciliation run the concurrent program **AMS-TM: Release Committed Budget Amount After Grace Period**.

6.8.16 Setting Up Budget Roll-up Views

Budget rollup view displays a budgets own amount plus all numbers of its descendent budgets.

Budgets can be allocated and arranged in a hierarchy, the rollup view gives an organization a "birds-eye" view of all budget balances summed up to each level. Activities and usages can be viewed by drilling down into different numbers such as committed, utilized. When drilled down from a rollup view, the details will show for the budget itself and all of its child budgets.

For example, a budget called "California" has committed amounts of \$10K. A budget called "Oregon" has \$20K. Their parent budget "Western US" funds no other activities, its rollup view committed therefore = \$30K.

To set up the budget roll-up view, set the profile AMS: Universal Currency at site level. This stores the one currency which is used to convert to all other currencies. In addition, for each user, set JTF_PROFILE_DEFAULT_CURRENCY so he can view the rollup view in his own currency.

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Set the profile option AMS: Universal Currency at the site level.
3. For each user set the “JTF_PROFILE_DEFAULT_CURRENCY” at user level.

This determines what currency a user will see his budget rollup view in.

4. To view the budget roll-up:

- a. Log in to Oracle Marketing.
- b. Navigate to the Budget tab.
- c. Select from drop down menu, the value “Rollup View”.

Self View will show all amounts for the budget itself only whereas Rollup View will show all amounts summed for the budget itself and all budgets underneath it.

- d. Wait for page to refresh.

The rollup view converts all budgets to the profile currency as set up above. Because the profile is set at user level, different users will see the rollup view accordingly.

6.8.17 Setting Up Third Party Accrual API Import

The Third Party Accrual API enables customers to generate accruals on orders made through third party whole sale corporations. This API simulates the pricing of orders and then creates order information in chargeback order tables. It posts the difference between customer paid price and simulated price to a budget that is setup by the customer. Any discount and accrual applied to the order is accrued.

Order information is stored in ozf_chargeabck_int_all table. The API process orders from direct customers as well as indirect customers. For indirect customer orders, the API does not run the pricing simulation. It copied the order information to the chargeback order tables.

For direct customers, the API validates the data, runs the simulation, creates the order and posts the accrual amount. Direct_customer_flag in ozf_chargeback_int_all indicates whether the order record is from a direct customer or not. Discount and accrual related information is stored in ozf_chargeabck_price_adj_all table.

For any exception generated during the process, a log record is created in an interface log table. User can use this table to modify the data.

6.8.17.1 Third Party Accrual API Concurrent Programs

The API consists of two concurrent programs:

AMS-TM: Chargeback Accrual

The **AMS-TM: Chargeback Accrual** program reads records in `ozf_chargeback_int_all` table. For each unique combination of order number and `bill_to_cust_account_id`, it creates an order header in `ozf_chargeback_headers_all` and copies order line information to `ozf_chargeback_lines_all`.

For each order, it runs the pricing simulation API to get the price for each order line. If the new price is smaller than the paid price, the program will update the utilized amount in funds utilization, otherwise the nothing will be posted to that account. Any discount and accrual that should be applied to the order is accrued for the customer.

MS-TM: Chargeback Purge

The **AMS-TM: Chargeback Purge** Program deletes the processed order from the interface table.

6.8.17.2 Preparing the Concurrent Program

Before running the concurrent program do the following:

- A user needs to setup the profile: AMS: Price Different Budget for the concurrent program to run.
- GL account information in `ozf_sys_parameters` needs to be setup properly.
- Account generator workflow needs to be compiled properly.
- Tables updated by the concurrent program:
 - `Ozf_chargeback_int_all`
 - `Ozf_chargeback_headers_all`
 - `Ozf_chargeback_lines_all`
 - `Ozf_funds_utilized_all_b`
 - `Ozf_funds_all_b`
 - `Ams_act_budgets`

6.9 Implementing Offers

Most offers leverage Advanced Pricing (Lump Sum and Trade Deals being the exception).

To implement Offers follow the procedures below:

- [Section 6.9.1, "Setting System Profiles for Offers"](#)
- [Section 6.9.2, "Creating and Verifying Lookups for Offers"](#)
- [Section 6.9.3, "Running Concurrent Programs for Offers"](#)
- [Section 6.9.4, "Posting Offers to General Ledger"](#)
- [Section 6.9.6, "Sourcing Funds for Offers"](#)
- [Section 6.9.7, "Customizing the Account Generator for Offers"](#)

6.9.1 Setting System Profiles for Offers

Set the following profiles for offers:

Table 6–24 Profile Options for Offers

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	Responsibility	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. If you do not set this profile, items will not appear in the LOV for Offers.
AMS : Offer Discount Level	Yes	Site		Used to set default value for Offer discount level. For example if setting to Line, and minimum volume is 5, then each order line will have a minimum quantity of five to get a discount.

Table 6–24 Profile Options for Offers

Option	Required	Level	Setting	Effect/Limitation
AMS : Offer Confidential Flag	No	Site	Yes/No	Used to set default value for Confidential flag in Offer Creation form. For example, if setting to Yes, then every time an offer is created, it will default to confidential (which can be overridden).
QP : Source System Code	Optional	Application	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. Offers with a Source System Code of Advanced Pricing are editable in Oracle Advanced Pricing.
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.
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.

Table 6–24 Profile Options for Offers

Option	Required	Level	Setting	Effect/Limitation
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.
AMS : Default Percent Formula	Yes	Site	Formulas Supported in Advanced Pricing	Used to set the default formula for a Discount Rule having Discount Type "Percent". For example, if the Value is set to "Handling" then when changing the Discount Type to "Percent" the value of Formula is set to "Handling".
AMS : Default Forecast UOM	Optional	All	Select from a defined UOM	This is the UOM that will default on the Forecast page.
AMS : Scan Data UOM	Yes	Site	All possible UOM values	Used to set the default value for UOM in the Discount rules for Scan Data Offers. For example if you choose "Each" then each empty Discount Rule in Scan Data Offers will appear with UOM as "Each".
AMS : Store Date in Qualifiers	Yes	Site	Yes/No	Used to specify the location to store date qualifiers in the offers. If this is set to Yes, the date qualifier (for example, shipping date) is stored in the qualifier. If the value is set to No, the date qualifier is stored in the header.

6.9.2 Creating and Verifying Lookups for Offers

Create or verify the following lookups for offers:

Table 6–25 Lookups for Offers

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
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

Table 6–25 Lookups for Offers

Key	Type	Values	Meanings
AMS_OFFER_BREAK_TYPE	System	Point Recurring	Point Recurring
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_MODIFIER_LEVEL_CODE	User	Line Group of Lines	Line Group of Lines
AMS_OFFER_OV_DISCOUNT_TYPE	System	Percent Terms Upgrade Percent Terms Upgrade	Percent Terms Upgrade Percent Terms Upgrade
AMS_VO_CUSTOMER_TYPES	Extensi ble	Buying Group Customer - Sold To Customer - Bill To	Buying Group Customer - Sold To Customer - Bill To
AMS_SD_CUSTOMER_TYPES	Extensi ble	Buying Group Customer	Buying Group Customer
AMS_VOLUME_OFFER_TYPE	Extensi ble	Accrual Off Invoice	Accrual Off Invoice
AMS_LUMPSUM_DISTRIBUTION_TYPE	Extensi ble	Percent Amount Quantity	Percent Amount Quantity

6.9.3 Running Concurrent Programs for Offers

Run the following concurrent programs for offers:

Table 6–26 Concurrent Programs for Offers in Trade Management

Concurrent Manager	Required	Description
AMS-TM: Funds Accrual Engine	Yes	This program will calculate the budget utilization and accrual earnings based on the offers executed in Order Management and update the budgets utilization column accordingly. In case of a Fully Accrued type of budget with accrue as “customer” the budget, committed and utilized columns are populated. In the case of budgets with the accrue as “sales” only the budget column will be populated. This allows the user to transfer money from a fully accrued budget to any other fixed type of budgets.
AMS-TM: Utilize Lump Sum offers	Yes	This program will account budget utilization against the Lump Sum offer whenever the offer start date arrives rather than on the offer approved or created date. In the case that the offer is active on the date when it was created, then the budget utilization will be updated immediately.
AMS: Transfer to GL	Yes	This program transfers TM’s GL posting entries to GL.
AMS-TM: Adjust Backdated Offer	Yes	This concurrent manager program takes the new terms of the offer and recalculates the parameters of the offer retroactively to the start date.

6.9.4 Posting Offers to General Ledger

AMS-TM: Transfer to General Ledger program, can be run with the option of “Submit Journal Import” or not. This program transfers the GL postings from TM’s interface to GL’s interface.

From GL’s interface, you will still need to run Journal Import and/or Post to GL programs. Source = “Marketing”.

Not all offers are posted to GL by TM. Posts to GL occur when the following conditions are met:

- When Lump Sum or Accrual offers update the budget utilized column
- When claims or deductions for the offer are settled
- When making adjustments to the utilized column, if the utilized amount for lump sum and accrual offers have increased

- When making adjustments to the utilized column, if the utilized amount for lump sum and accrual offers have decreased.

Neither TM or Oracle Marketing posts to GL when the following discount offers appear on the order:

- Off invoice
- Promotional goods
- Order value
- Terms Upgrade
- If posted to budget checkbook as “utilization” and “paid”

Oracle Marketing posts to GL, when the following discount offers do not appear on the order:

- Accrual and Lump Sum offer
- Offer posted to budget checkbook as “earnings”
- Lump Sum offer posted on the offer start date (used in TM)

To set up TM to post offers to GL, use the following procedure.

6.9.5 Setting System Parameters for Offers

Perform the following administrative procedures for offers:

Prerequisites

None

Steps

1. Log into Marketing Online.
2. Navigate to Administration > Marketing.
3. Make the following selections, entering information as it pertains to offers.

Table 6–27 System Parameters for Offers

Component	Item	Choices	Effect
Setup	Web Offer Queries	Queries for Product and Market Eligibilities	The queries defined here are used to retrieve the products and customers in the forecast pages.
Setup	Custom Setup	Under available attributes for Offers Setup is Forecast component	Select the Forecast component for Offers to add Forecast to the Offers side panel menu.

4. 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.

6.9.6 Sourcing Funds for Offers

Individual offers can have the option to source from either a campaign (parent) or a budget directly. This allows offers the flexibility to define its funding source. When a campaign is the funding source of an offer, the campaign acts like a “mini-budget”. The offer can only source up to what available amounts the campaign has.

Sourcing funds for offers from a campaign or budget functionality gives the sales manager the ability to create multiple campaigns from a single budget and assign owners to specific campaigns, thus enhancing the manager’s ability to monitor spending. The function also permits the sales person to source funding for Trade Deal type offers from either a campaign or a budget, which simplifies the offer execution process.

This functionality is based on profile – **AMS : Source from Parent Object**.

6.9.7 Customizing the Account Generator for Offers

If your business requirements call for the need to post promotional accruals (for accrual, lump sum offers) to the GL you can customize the Account Generator Workflow to accomplish this task.

Customization is done through the workflow tool. Customization defines the value of a certain segment of the whole account.

For example:

- Account structure = company-account type-customer-product-spare
- Base account = 01-0001-0002-0000-000
- Customized = 01-0001-8888-2344-000 (e.g. changed based on the customer and product derived from an order)

The default account generator assumes an accounting structure with product segment and with name of that segment as 'Product'. This needs to be changed in the workflow based on the implementation.

In order to debug the account generator workflow, set the profile **Account Generator : Debug mode** to **Yes**. Workflow process can then be seen from process editor and the owner of the workflow will be the user who runs the concurrent program or performs an action which invokes accounting.

Addition attributes, functions or processes can be added and the current process can be customized to suit business requirements. Please read the Workflow document on preserving Customizations.

Follow these general guidelines when customizing the AMS - Account Generator workflow:

- Process: Generate a default account
- Function: Get expand CCID for line
- Package: AMS_ACCT_GENERATOR
- Procedure: Get Cost_Sale_Item_Derived

The following attributes are available for customization:

- Account Type
- Claim ID
- Budget ID
- Offer ID

- Line ID
- Inventory Item ID (seeded)
- Price Adjustment ID
- Customer ID
- Order Category
- Ord ID

To customize the Default Account Generator follow the procedures below:

Prerequisites

- Implementation team possesses skills in PL/SQL, Oracle Workflow, and General Ledger
- Accounting Flexfield structure for each set of books is defined
- Segment values and validation rules for flexfields are defined
- Business requirements for using the default Account Generator process versus customizing it to meet the organization's accounting needs are determined
- The default Account Generator process is determined

Steps

1. Evaluate the default Account Generator.

Determine whether or not the Default Account Generator process meets your organization's accounting requirements. The default process may be updated later as needs change. You may make minor changes to the Default Account Generator process without changing the name. TM comes with the Account Generator item type -- Generate Default Account.

2. Customize the default Account Generator process.

If your business requirement determine that the Account Generator process must be customized, then note the following:

a. Set Account Generator : Debug mode to Yes.

In order to debug the account generator workflow, this profile must be set to Yes. This enabled the Workflow process to be seen from the process editor and the owner of the workflow will be the user who runs the concurrent program or performs an action which invokes accounting.

b. Verify segment name as 'Product'.

The default account generator assumes an accounting structure with product segment and with name of that segment as 'Product'. This needs to be changed in the workflow based on the implementation.

c. Add attributes, functions, or processes.

Addition attributes, functions or processes can be added and the current process can be customized to suit business requirements. Please read the Workflow document on preserving customizations.

3. Save your work.

For more information, refer to the *Oracle Applications Flexfield Guide, Chapter 10 Account Generator*.

6.10 Administering Offers

The way in which you administrate the Offers and Trade Planning component of TM depends on the requirements of your business. As such, not all administrative tasks need to be performed.

For TM purposes, 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. Offers update the utilized and paid columns of a budget.

TM supports the following offer types:

- Lump Sum
- Off Invoice
- Order Value
- Promotional Goods
- Terms Upgrade
- Trade Deal
- Volume Offers
- Scan Data Offers

To Administrate Offers follow the procedures below:

- [Section 6.10.1, "Setting Up Forecasting for Offers"](#)
- [Section 6.10.2, "Setting Up Budget Offer Validation"](#)

- [Section 6.10.3, "Setting Up Volume Offer"](#)
- [Section 6.10.4, "Setting Up Backdating"](#)
- [Section 6.10.5, "Setting Up Scan Data Promotions"](#)

6.10.1 Setting Up Forecasting for Offers

Forecasts can be created for all types of offers and any offer status. The exception to this is for Order Value -- Order Value offer does not have any product specification.

Forecasts can be created only if there is at least one customer and one product selected in the Offer. Forecasts support multiple customers and products.

Prior to being frozen - user can update Forecast. Once frozen -- a Forecast and product combination will not be changed regardless of changes in the Offer's customer and product selection. Once frozen the Forecast cannot be deleted. New Forecast versions can be created after a previous one is frozen. Forecasts are created in quantity, not monetary value.

Forecasts are created at Offer or Campaign level. If created on Offer level, it looks up the historical sales data for the customers and products selected for that given Offer. If created on the Campaign level, it sums up for the different

For Offer Forecasting, TM uses an API from Inventory called CST_COST_API.get_item.cost. We input the inventory item ID and org ID, and it returns the cost of goods sold to us.

To implement Forecasts for Offers, use the following procedure.

Prerequisites

None

Steps

1. Run AMS-TM: Refresh of Base Sales Materialized View.

Because Forecasts are done based on historical sales data, there must be historical sales data in the system.

2. Set AMS-TM profiles at user level.

3. This profile determines the default Unit of Measure (UOM) used for calculating the Forecast. If historical sales data are in different UOMs, they will all be converted into this profile UOM.

4. Ensure that the Forecast flag is checked as Mandatory in the corresponding Campaign or Offer Custom Setup. To verify:
 - a. Log in to Oracle Marketing.
 - b. Navigate to Administration > Marketing > Setup > Custom Setup.
Forecasts can be created for Campaign or Offer.

6.10.2 Setting Up Budget Offer Validation

This is an option to enforce that the customer and product targets of a promotional offer matches those specified as conditions in the budget it is sourcing money from. It ensures that funds planned for certain customers and products are used appropriately.

For example, a company may create a budget used for California Retailers and Orange Juice only. If the validation is turned on, an offer created for Oregon Retailers and Milk will not be allowed to source from that budget.

Based on profile: AMS: Validate market and product eligibility between object and budget

Needs to run from System Administrator responsibility: Workflow Background Process/AMS: Marketing Approvals

If validation fails, “revert status” process will kick in, thus reverting the status of an object (e.g. an offer) from submitted or pending back to the one it was before, e.g. draft. A notification is sent at the same time to the object owner.

6.10.3 Setting Up Volume Offer

Consumer Goods industry frequently enter into trade commitments with customers that span months, quarters even an entire calendar or fiscal year or these commitments may surround special trade Events such as new product introductions. Trade commitments are commonly referred to as “Performance Programs”, “Purchase Contracts” or “National Agreements.”

The goal of volume offer is to provide an enticement to purchase. The incentive covers the cumulative purchases of the specified goods, and accrues as the manufacturers ships their goods to the customer.

Typically the commitment provides multiple performance tiers for the customer. For example an offer may be executed for one quarter with the following structure,

- Purchase \$100k receive 3% incentive

- Purchase \$200k receive 4% incentive
- Purchase \$300k receive 5% incentive

TM accommodates this type of offer execution - which we call Volume Offer, will be yet another differentiator versus the competition.

- **Utilized:** As offer's Event Phase determines. Best practice is to set this to shipped. If offer is set as "Retroactive", additional updates to Utilized will be made on previous orders as well.
- **Paid:** Claim/Deduction is settled

Volume Offer Seeded Values

- Volume Type Seeded Values: Amount or Quantity
- Discount Type Seeded Values: Amount and Percent

Calculating Volume Offer

The Volume Offer considers actual shipments within the date range of the offer not booked orders for the product(s) specified in the Product Profile table. Actual shipment values will be derived from Order Management.

6.10.4 Setting Up Backdating

Often, business requirements mandate manufacturers to have the ability to easily alter the original conditions of an offer while the offer is still active. Using the backdating functionality in TM, a user can enter an active offer and "Adjust" the discount terms and product group involved.

The Offer Adjustment Function is available for user-defined role. Access to the "Offer Adjustment" page is predicated on the user's role and responsibility.

When active, offer adjustment, is available (for planned, active, and draft) for the following offer types:

- Off-Invoice
- Accrual
- Trade Deal
- Order Values
- Promotional Goods

Using the backdating OTM concurrent process initiates a search utilizations for all postings relating to the specific offer, sort by customer and product and calculate the corresponding differential.

The differential would be posted to the checkbook by product. The posting would be categorized as a “Backdating Adjustment” and the GL posting would occur in the same month that the concurrent process is run. Backdating adjustments as well as adjustments of all types made to an offer will be reflected in the Claims Association Offer Summary view.

6.10.5 Setting Up Scan Data Promotions

Scan Data promotions are a common promotional tactic executed by companies in most all consumer goods industries. Common examples of Scan Data promotions are coupons or consumer rebate programs, and may be received by a manufacturer as import file from a POS system. These manufacturer sponsored coupons, rebated or discounts are redeemed at retail by the consumer, then processed through third party clearing house who in turn passes the data to the manufacturer who makes payment to the retailer. In some cases the retailer may submit the scan data directly to the manufacturer, the manufacturer then validates the data and remits payment to the retailer.

TM has the ability to allow the acceptance of such scan data from a third party source, the collected data may then be researched, verified and resolved so payment to the appropriate retailer may be made and the open liability settled. In some cases the retailer may submit the scan data directly to the manufacturer, in those cases the manufacturer validates the data and remits payment to the retailer.

- **Utilized:** Total offer amount updates Utilized when offer goes Active.
- **Paid:** Claim/Deduction is settled

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration >Marketing>Set Up >Activity.
3. Create specific mediums that relate to specific trade activities.

The values returned in the Trade Medium LOV are predicated on the Activity that is selected at the “create” level. The user may create and customize additional Activity / Trade Medium relationships as needs arise or the values may be defined and set during setup.

4. Log in to Oracle Forms as General Ledger Super User.

5. Navigate to GL Posting for Accrual.

At the same time a scan data offer updates budget's utilized column, if GL postings created by TM are used based on a profile, TM writes a debit and a credit accounting entry into its interface to be transferred to GL. Lump Sum can update Utilized a few different ways:

- Lump Sum total amount can update Utilized when it goes Active
- If it is active now but start date is not reached, it updates Utilized when the start date is reached, based on the AMS-TM: Utilize Lump Sum concurrent process.
- If companies choose the option of not updating Utilized by the total Lump Sum amount at once, but rather by spreading the utilizations over the life of the offer, then Lump Sum offer updates Utilized periodically.

6. Customize Account Generator.

The GL accounts are taken first from the Budget, then Budget Category, then System Parameters. If implemented, Account Generator workflow can be modified to customize the GL accounts for each offer line.

Implementing Market Intelligence

This chapter includes implementation and administration tasks for implementing Oracle Marketing Market Intelligence.

Topics include:

- [Section 7.1, "Marketing Intelligence Overview"](#)
- [Section 7.2, "Implementing Market Intelligence"](#)
- [Section 7.3, "Implementing Lead Intelligence"](#)

7.1 Marketing Intelligence Overview

Oracle Marketing's marketing intelligence is displayed as homepage bins, reports, and charts that provide summary information about key marketing activities, along with links to recently accessed campaigns and Events.

Oracle Marketing Intelligence displays the following:

- **Most Recent Bins:** Display links to recently accessed campaigns and Events. The links are generated automatically when you create or edit a campaign or Event. The links navigate you to the details page for the object type. Most Recent bins are available for campaign and Event objects.
- **Reporting Bins:** Display trend performance information for key marketing activities. Some examples include campaign effectiveness, Event effectiveness, and marketing budgets. Each reporting bin contains links to more granular detailed reports.
- **Reports:** Displayed directly on the homepage are drill-down reports linked from a reporting bin, but with a configurable date range specified by the user. The date aggregate for the report is inherited from the calling bin. For example, when drilling down on the month of September, all data for the drilldown reports is about September.
- **Charts:** Display trend performance information for key marketing activities. They illustrate information based on date ranges specified by the user. In Oracle Marketing, charts render the top comparisons. For example, if you are viewing a Campaigns by Leads chart and the number of rows to display is 10, then the chart for Campaigns by Leads will show the Top 10 Campaigns by Leads.

For more information on using Bins, Reports and Charts see the *Oracle Marketing User's Guide*.

7.2 Implementing Market Intelligence

This section describes how to implement Marketing Intelligence functionality displayed on the homepage of the Oracle Marketing. This includes the Bins, Charts and Reports. Displaying the following marketing objects is covered in this section:

- Campaigns
- Events
- Budgets
- Key performance indicators

- Marketing activities
- Interaction history responses

Use the following procedures to implement Market Intelligence:

- [Section 7.2.1, "Setting System Profile Options for Market Intelligence"](#)
- [Section 7.2.2, "Defining Marketing Calendar Periods"](#)
- [Section 7.2.3, "Implementing Lookups for Market Intelligence"](#)
- [Section 7.2.4, "Defining Exchange Rates"](#)
- [Section 7.2.5, "Loading Marketing Facts for a First Time Build"](#)
- [Section 7.2.6, "Creating Intial Build of Materialized Views"](#)
- [Section 7.2.7, "Refreshing Materialized View for Campaigns, Events, and Budgets"](#)
- [Section 7.2.8, "Loading Marketing Facts From a Previous Refresh Date"](#)

7.2.1 Setting System Profile Options for Market Intelligence

Set the following system profiles for Market Intelligence.

Table 7–1 Market Intelligence Profile Options

Option	Required	Level	Setting
BIM Month Period Type	Yes	System	Select the month period type corresponding to the Marketing Calendar.
BIM Quarter Period Type	Yes	System	Select the quarter period type corresponding to the Marketing Calendar.
BIM Year Period Type	Yes	System	Select the year period type corresponding to the Marketing Calendar.

7.2.2 Defining Marketing Calendar Periods

The calendar periods must be defined for the Marketing Calendar for the fiscal year containing the date one year prior to the start date. The Start Date is the first date for which data in the Bins, Charts and Reports should be displayed. Also define the periods: Month, Quarter and Year.

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.

Prerequisites

None

Steps

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

7.2.3 Implementing Lookups for Market Intelligence

This procedure is only necessary if using the web response interface public APIs: AMS_RESP_REJECT_REASON and AMS_RESP_GRADE.

See the table below for lookups, types, values, and meanings:

Table 7-2 Lookups for Market Intelligence - Web Responses

Key	Type	Values	Meanings
AMS_RESP_REJECT_REASON	User	User Defined	Organization defined rejection reasons.
AMS_RESP_GRADE	User	User Defined	Organization defined response grades.

7.2.4 Defining 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.

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**.

Prerequisites

None

Steps

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.

7.2.5 Loading Marketing Facts for a First Time Build

Execute this Request Set only for the first time load. The Request for a first time build consists of 8 concurrent programs.

Use the following procedure to run a request set:

Prerequisites

None

Steps

- 1. Log in to Oracle Marketing as 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 concurrent programs in this request set. 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. Change the dates as desired and click OK.

The Start and End dates are defaulted to the sysdate. 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. Click Submit.

The Request set will run and execute all the above concurrent programs sequentially.

Table 7–3 Request Set: Loading Marketing Facts for a First Time Build

Sequence	Concurrent Program	Parameters	Est Time	Comments
0	BIM: Truncate all facts	Objects (select from: All, Campaigns, Events, Budgets, Leads, Lead Import, Response)		This program removes all previously loaded facts. It should be used only when the data should be removed in its entirety

Table 7-3 Request Set: Loading Marketing Facts for a First Time Build

Sequence	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
4	BIM:Load Key Performance Indicator Facts		1 Min	Loads KPI facts
5	BIM: Load Marketing Facts for the First Time	Object to Load: Leads Start Date: 01-SEP-00 End Dates: (SYSDATE)	30 Mins	Loads Lead Facts
6	BIM: Load Marketing Facts for the First Time	Object to Load: Lead_Import Start Date: 01-SEP-00 End Dates: (SYSDATE)	7 Mins	Loads Lead Import Facts
7	BIM:Load Marketing Facts for the First Time	Object to Load: Response Start Date: 01-SEP-00 End Dates: (SYSDATE)	5 Mins	Loads Web Response Facts

7.2.6 Creating 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 program has to be run only once and should not be run during subsequent loads.

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

Prerequisites

None

Steps

1. Log in to Oracle Forms as 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 concurrent programs listed below. 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. The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4.
8. Repeat the steps 5 and 6 for the third and fourth rows.
9. After verifying all the parameters, click Submit.

The Request set will run and execute all the above concurrent programs sequentially:

Table 7–4 Request Set: BIM: Initial Build of Materialized Views

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

Table 7–4 Request Set: BIM: Initial Build of Materialized Views

Seq	Concurrent Program	Parameters	Est Time	Comments
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
5	BIM: Initial Build of Interaction History Response Materialized Views		1 Min	Prepares pre-built tables for Interaction History Response Materialized views

7.2.7 Refreshing Materialized View for Campaigns, Events, and Budgets

The 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 program has to be run each time after facts are loaded or refreshed.

Prerequisites

None

Steps

1. Log in to Oracle Forms as 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 display the concurrent programs listed in the table below. 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.
8. Click on the Parameter column of the second row. The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4.
9. Repeat steps 8 and 9 for third, fourth, and fifth rows.
10. After verifying all the parameters, click **Submit**.

The Request set will run and execute all the above concurrent programs sequentially.

7.2.8 Loading Marketing Facts From a Previous Refresh Date

This request set will load all the marketing facts from the previous refresh date. Execute this Request Set on a daily basis. This program has to be run each time facts are loaded or refreshed.

Prerequisites

Marketing facts are properly implemented

Steps

1. Log in to Oracle Forms as 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 display the concurrent programs listed below.
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.

Note: The end date is defaulted from the value entered in the first row. Change the date as desired and click OK.

12. After verifying all the parameters, click Submit. The Request Set will run and execute all the above concurrent programs sequentially.
13. Note: that this program has to be run on a daily basis.
14. Run the Request Set: BIM: Refresh Materialized Views, above, to build the materialized views following the steps instructions listed above.

Table 7–5 Request Set: BIM Load Marketing Facts from a Previous Refresh Date

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Load Marketing Facts from previous refresh date	Object to Load: Campaign End Date: (SYSDATE)	5 Mins	Loads all Campaign Facts
2	BIM: Load Marketing Facts from previous refresh date	Object to Load: Event End Date: (SYSDATE)	5 Mins	Loads all Events Facts
3	BIM: Load Marketing Facts from previous refresh date	Object to Load: Budget End Date: (SYSDATE)	5 Mins	Loads all Budget Facts
4	BIM: Load Key Performance Indicator facts from previous refresh date		5 Mins	Loads all KPI Facts

Table 7–5 Request Set: BIM Load Marketing Facts from a Previous Refresh Date

Seq	Concurrent Program	Parameters	Est Time	Comments
5	BIM: Load Marketing Facts from previous refresh date	Object to Load: Leads End Date (SYSDATE)	5 Mins	Loads Lead Facts
6	BIM: Load Marketing Facts from previous refresh date	Object to Load: Lead_Import End Date (SYSDATE)	5 Mins	Loads Lead Import Facts
7	BIM: Load Marketing Facts from previous refresh date	Object to Load: Response End Date (SYSDATE)	5 Mins	Loads Web Response Facts

7.3 Implementing Lead Intelligence

This section describes how to implement Lead Intelligence functionality that is displayed on the homepage of the Oracle Marketing. This section covers how to display the following marketing objects on the homepage:

- Leads
- Lead Import
- Web Surveys
- Web Responses

Use the following procedures to implement Lead Intelligence:

- [Section 7.3.1, "Creating Initial Build of Materialized View for Lead Intelligence"](#)
- [Section 7.3.2, "Refreshing Materialized Views for Lead Intelligence"](#)
- [Section 7.3.3, "Loading Marketing Facts from Previous Refresh Date"](#)

7.3.1 Creating Initial Build of Materialized View for Lead Intelligence

Execute this Request Set only for the first time. This prepares the pre-built tables for all materialized views for Lead Intelligence. This program has to be run only once and should not be run during subsequent loads.

Prerequisites

None

Steps

1. Log in to Oracle Forms as 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 display the concurrent programs listed in the table below. 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. The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4.
8. Repeat the steps 5 and 6 for the third and fourth rows.
9. After verifying all the parameters, click Submit.

The Request set will run and execute all the above concurrent programs sequentially.

Table 7–6 Request Set BIM: Initial Build of Materialized Views for Lead Intelligence

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Initial build of Lead KPI Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Lead KPI Materialized views
2	BIM: Initial build of Lead Quality Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Lead Quality Materialized views

Table 7–6 Request Set BIM: Initial Build of Materialized Views for Lead Intelligence

Seq	Concurrent Program	Parameters	Est Time	Comments
3	BIM: Initial build of Lead Sources Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Lead Sources Materialized views
4	BIM: Initial build of Lead Import Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Lead Import Materialized views
5	BIM: Initial Build of Responses Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Responses Materialized views

Table 7–7 Request Set: BIM: Refresh Materialized View

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

7.3.2 Refreshing Materialized Views for Lead Intelligence

Builds the Materialized views for Leads, Lead Import and Web Responses. 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 program has to be run each time facts are loaded or refreshed.

Prerequisites

None

Steps

1. Log in to Oracle Forms as 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 display the concurrent programs listed below.
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.
8. Click on the Parameter column of the second row. The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4.
9. Repeat steps 8 and 9 for third, fourth, and fifth rows.
10. After verifying all the parameters, click Submit.

The Request set will run and execute all the above concurrent programs sequentially.

Table 7–8 Request Set: BIM Refresh of Materialized Views for Lead Intelligence

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Refresh of Summary by Group Hierarchy	Number of Parallel Processors: 4	10 Mins	Prepares summarized tables based on group hierarchy. This has to be run first before running any other lead intelligence refresh materialized view program.
2	BIM: Refresh of Lead KPI Materialized Views	Number of Parallel Processors: 4	45 Mins	Builds Lead KPI Materialized Views
3	BIM: Refresh of Lead Quality Materialized Views	Number of Parallel Processors: 4	60 Mins	Builds Lead Quality Materialized Views

Table 7–8 Request Set: BIM Refresh of Materialized Views for Lead Intelligence

Seq	Concurrent Program	Parameters	Est Time	Comments
4	BIM: Refresh of Lead Sources Materialized Views	Number of Parallel Processors: 4	60 Mins	Builds Lead Sources Materialized Views
5	BIM: Refresh of Lead Import Materialized Views	Number of Parallel Processors: 4	5 Mins	Builds Lead Import Materialized Views
6	BIM: Refresh of Responses Materialized Views	Number of Parallel Processors: 4	5 Min	Builds Responses Materialized Views

7.3.3 Loading Marketing Facts from Previous Refresh Date

This request set will load all the marketing facts from the previous refresh date. Execute this Request Set on a daily basis. This program has to be run each time facts are loaded or refreshed.

Prerequisites

None

Steps

1. Log in to Oracle Forms as 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 display the concurrent programs listed below.
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.

Note: The end date is defaulted from the value entered in the first row. Change the date as desired and click OK.

12. After verifying all the parameters, click Submit. The Request Set will run and execute all the above concurrent programs sequentially.
13. Note: that this program has to be run on a daily basis.
14. Run the Request Set: BIM: Refresh Materialized Views, above, to build the materialized views following the steps instructions listed above.

Table 7–9 Request Set: BIM Load Marketing Facts from Previous Refresh Date

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Load Marketing Facts from previous refresh date	Object to Load: Campaign End Date: (SYSDATE)	5 Mins	Loads all Campaign Facts
2	BIM: Load Marketing Facts from previous refresh date	Object to Load: Event End Date: (SYSDATE)	5 Mins	Loads all Events Facts
3	BIM: Load Marketing Facts from previous refresh date	Object to Load: Budget End Date: (SYSDATE)	5 Mins	Loads all Budget Facts
4	BIM: Load Key Performance Indicator facts from previous refresh date		5 Mins	Loads all KPI Facts

Table 7–9 Request Set: BIM Load Marketing Facts from Previous Refresh Date

Seq	Concurrent Program	Parameters	Est Time	Comments
5	BIM: Load Marketing Facts from previous refresh date	Object to Load: Leads End Date (SYSDATE)	5 Mins	Loads Lead Facts
6	BIM: Load Marketing Facts from previous refresh date	Object to Load: Lead_Import End Date (SYSDATE)	5 Mins	Loads Lead Import Facts
7	BIM: Load Marketing Facts from previous refresh date	Object to Load: Response End Date (SYSDATE)	5 Mins	Loads Web Response Facts

Implementing Marketing Metrics

This chapter includes implementation and administration tasks for Marketing Metrics.

Topics include:

- [Section 8.1, "Marketing Metric Overview"](#)
- [Section 8.2, "Implementation Tasks"](#)
- [Section 8.3, "Logical Process of Creating Metrics"](#)
- [Section 8.4, "Creating a Summary Metric"](#)
- [Section 8.5, "Creating a Manual Metric"](#)
- [Section 8.6, "Creating a PL/SQL Program for Metrics"](#)
- [Section 8.7, "Setting Up Procedure Metrics"](#)
- [Section 8.8, "Setting Up Function Metrics"](#)
- [Section 8.9, "Creating Rollup Metrics"](#)
- [Section 8.10, "Creating Variable Metrics"](#)
- [Section 8.11, "Associating Metrics to Marketing Objects"](#)
- [Section 8.12, "Running the Metrics Concurrent Program"](#)
- [Section 8.13, "Setting Metric Profile Options"](#)
- [Section 8.14, "Setting Up Metric Templates"](#)
- [Section 8.15, "Seeded Metrics Reference"](#)

8.1 Marketing Metric Overview

Metrics are measurements used for tracking the effectiveness of marketing activities. Metrics can be associated with each of the following marketing objects:

- Programs
- Campaigns
- Campaign Schedules
- Events
- Event Schedules
- One-Off Events
- Deliverables

Metrics include both forecast and actual values. These values are either added manually or automatically calculated by the Marketing application. Metrics can also be used to initiate Campaign Triggers. For example, a Responses Count metric greater than a desired value could be used to trigger a follow-up Campaign Schedule to a larger audience.

Metric measurement examples:

- Campaign Costs
- Registration
- Responses
- Booked Orders
- Allocation Costs
- Revenues

To understand and implement marketing metrics see the following:

- [Section 8.1.1, "Metric Categories"](#)
- [Section 8.1.2, "Metric Object Hierarchy"](#)
- [Section 8.1.3, "Metric Calculation Types"](#)
- [Section 8.1.4, "Metric Currency Values"](#)

8.1.1 Metric Categories

Metrics can be grouped into logical categories. For example, all metrics used to track expenses for marketing activities can be grouped into the “Cost” category. Several metric categories, including Cost, Revenue, Response and Other are seeded with the Oracle Marketing application. As the Marketing Administrator you can create additional metric categories as needed.

Seeded Metric Categories:

- Cost: Tracks expenses
- Revenue: Tracks income
- Response: Tracks number of people who have responded
- Other: Tracks any other type of detail
- Allocation: Tracks budget allocation as it relates to the Marketing Object specified
- Lead: Tracks leads and opportunities from Oracle Sales Online
- Opportunity: Tracking the number of opportunities from Oracle Sales Online
- Order Amount: Tracks booked order amount
- Registrants: Tracks number of people registered for an Event
- Attendees: Tracks number of attendees for an Event
- Cancellations: Tracks number of cancellations for an Event
- Order Count: Tracks number of orders placed

8.1.2 Metric Object Hierarchy

The metric hierarchy dictates how objects relate to each other and how their associated metric values will rollup within the hierarchy. Ultimately, the metric hierarchy dictates how metric values will be totalled across marketing objects.

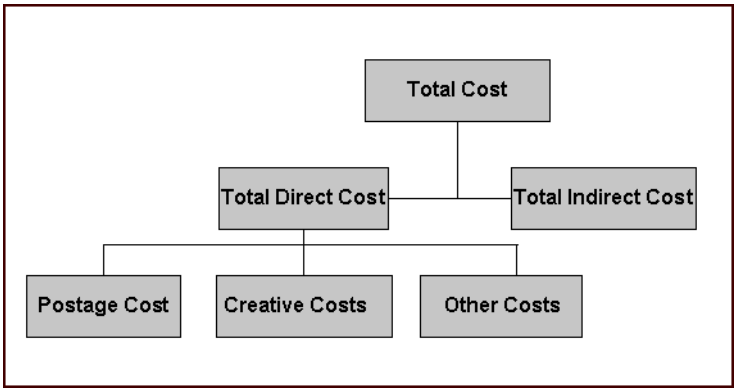
Metrics hierarchies:

- [Section 8.1.2.1, "Summary Hierarchy"](#)
- [Section 8.1.2.2, "Rollup Hierarchy"](#)

8.1.2.1 Summary Hierarchy

Within a single marketing object, metrics of similar categories (Cost, Revenue, Response, etc.) are organized into Summary Hierarchies. For example, within a Direct Mail Campaign Schedule, Cost-category metrics can be related hierarchically as follows:

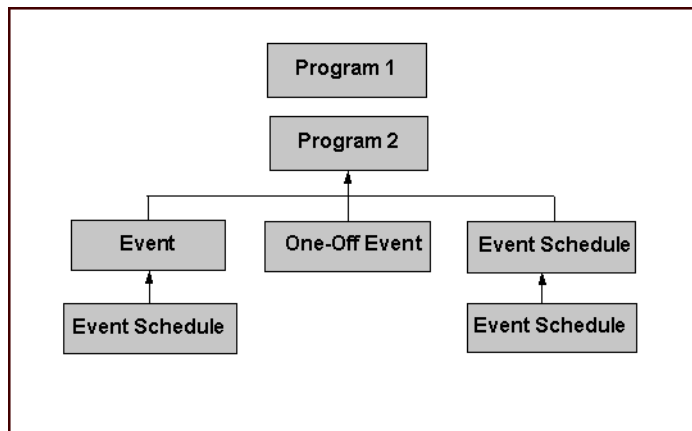
Figure 8–1 Summary Hierarchy



In this example, Postage Cost, Creative Costs, and Other Costs are summarized to Total Direct Cost. These lower level costs are added to Total Indirect Cost (e.g. overhead expenses) to obtain Total Cost for the Campaign Schedule.

8.1.2.2 Rollup Hierarchy

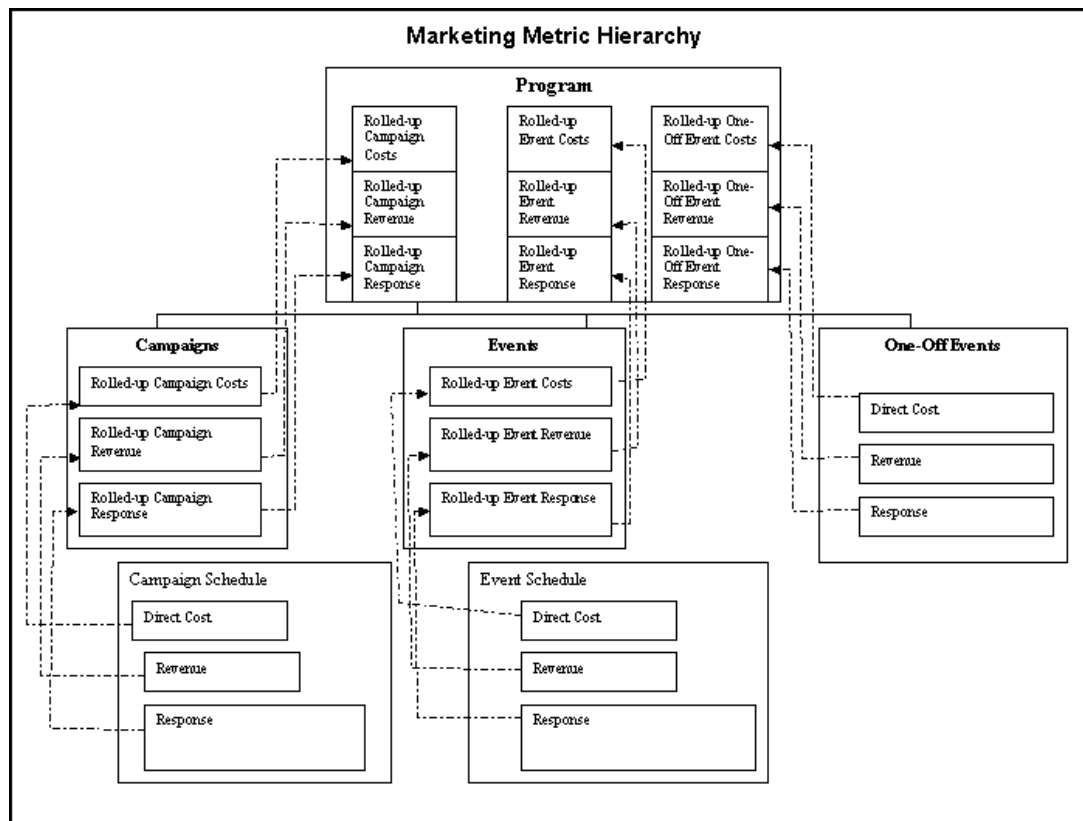
The Rollup Hierarchy refers to links between metrics of different objects within the Marketing Object Hierarchy. A typical marketing object hierarchy is shown below:

Figure 8–2 Rollup Hierarchy

The Rollup Hierarchy enables metrics from lower-level marketing objects (e.g. Campaign Schedules and Event Schedules) to be rolled up to parent objects (Campaigns and Events) and grandparent objects (Programs).

The following represents a detailed Rollup Metric Hierarchy. In this example, Direct Costs, Revenues and Responses are rolled up the marketing object hierarchy from the Schedule level to the Campaign/Event level to the Program level.

Figure 8–3 Marketing Rollup Metric Hierarchy



8.1.3 Metric Calculation Types

The metric calculation type determines the way in which forecast and actual values for a metric are entered into the system.

Four metric calculation types are available:

- **Manual:** Receives both forecast and actual values from user input.
- **Function:** Receives actual values from a custom PL/SQL function or stored procedure. This function or procedure contains logic for calculating the actual value based on information within the Oracle E-Business Suite.
- **Summary:** Receives both forecast and actual values from lower-level metrics in the summary hierarchy. May have subordinate metrics of any type (summary,

manual, rollup or function) within the same metric category (Cost, Revenue, Response, etc.). This metric is automatically associated with a marketing object when any subordinate metric is associated.

- **Rollup:** Receive both forecast and actual values from lower levels in the marketing object hierarchy. Only manual and function metrics within a lower-level object (e.g. Campaign Schedule) can be linked to a rollup metric in a higher-level object (e.g. Campaign). All child metrics of a rollup metric must be in the same metric category (Cost, Revenue, Response, etc.).

8.1.4 Metric Currency Values

Metrics with the categories of Cost and Revenue have an attribute of “Currency”. Two currencies apply to each metric, one for the displayed (transactional) value and one for the internal (functional) value.

Rollup and Summary metrics display the currency value according to the marketing object's currency. Manual and Function metrics are defaulted to the marketing object's currency but may be changed for each metric. All Cost and Revenue metrics are rolled up using the internal functional currency, which is the same system wide. Use FND_PROFILE.VALUE ('AMS_DEFAULT_CURR_CODE') to determine functional currency.

The transactional value is rounded to the GL 'Minimum Accountable Unit'. The function value is stored without rounding to maintain required precision when converting to the displayed (transactional) currency.

For example if the transactional currency is Mexican Peso (MXP) and functional currency is US Dollar (USD), with the conversion rate of 15,000 MXP/USD then conversion from 10,001 MXP to 0.67 USD (rounded), converting back produces 10,050 MXN, and removing the rounding on the functional currency produces 0.66673333 -- USD to 10,001 MXN.

8.2 Implementation Tasks

A number of commonly used metrics are seeded with the product and enabled at time of deployment. If implementing additional metrics, defined specifically for your organization, as the Marketing Administrator you must create and set up these up. The procedures in this section will demonstrate how to accomplish that.

See the following table for task procedures:

Table 8–1 Implementing Metrics

Task Name	Requirement	Description
Logical Understanding of how to create Metrics	Optional	Section 8.3, "Logical Process of Creating Metrics"
Creating a Summary Metric	Optional	Section 8.4, "Creating a Summary Metric"
Creating a Manual Metric	Optional	Section 8.5, "Creating a Manual Metric"
Creating a PL/SQL Program for Metrics	Optional	Section 8.6, "Creating a PL/SQL Program for Metrics"
Creating Procedure Metrics	Optional	Section 8.7, "Setting Up Procedure Metrics"
Creating Function Metrics	Optional	Section 8.8, "Setting Up Function Metrics"
Creating Rollup Metrics	Optional	Section 8.9, "Creating Rollup Metrics"
Creating Variable Metrics	Optional	Section 8.10, "Creating Variable Metrics"
Associating Metrics to Specific Marketing Objects	Optional	Section 8.11, "Associating Metrics to Marketing Objects"
Running Concurrent Program for Metrics	Optional	Section 8.12, "Running the Metrics Concurrent Program"
Setting Metric Profile Options	Optional	Section 8.13, "Setting Metric Profile Options"
Creating Metric Templates	Optional	Section 8.14, "Setting Up Metric Templates"

8.3 Logical Process of Creating Metrics

Metric creation will depend on the Marketing Object being measured. When creating a new metric for a marketing object, a calculation method must be selected. The calculation method indicates how a metric receives input values. For example, if the calculation method “values roll up from lower level” is selected, the metric values will roll up from a lower level marketing object.

When creating a new Metric, it can be simple or very complicated, depending on the aspect of the marketing object being measured. Regardless of the complexity,

the logical flow for creating a metric remains constant. The general flow is shown below.

Figure 8–4 Logical flow for Creating Metrics



8.4 Creating a Summary Metric

Summary metrics enable values to be calculated vertically in the hierarchy. Values are totalled at the marketing object level. Summary metrics may have subordinate metrics of any type (summary, manual, or function). Summary metrics should be created to total the manual metrics at that marketing object level.

Summary Metrics are assigned automatically to the marketing object when any subordinate metric is assigned.

For example, you can create a metric called “total cost” for the Campaign Object. Within the Campaign Object, you may have various Campaign Schedules, each schedule having its own cost associated. By creating a Summary Metric, will do totals for the campaign schedules will be summarized at the Campaign Object level.

Summary metrics can be rolled up at same level but are not permitted to be rolled up to parent level.

Table 8–2 Parent level rollup restrictions for Summary Metric

Summarize To

☐ N/ A Of The Parent

☐ N/ A At Same Level

Use the following procedure to create a summary metric:

Prerequisites

None

Steps

1. Navigate to Administration > Marketing > General > Metric.
2. Select Create.
3. Enter a Name for the metric.
4. Leave Enabled checked.
This enables the metric to be used.
5. Select a Category from the Seeded List.
 - Allocation
 - Cost
 - Response
 - Revenue
 - Leads
 - Opportunities
 - Order Amount
 - Registrants
 - Attendees
 - Cancellations
 - Other
 - Any
6. Select a sub category if one is available. The following is a list of seeded sub categories for cost:
 - Campaign Cost
 - Deliverable Cost
 - Distribution Cost
 - Event Cost
 - List Cost
 - Miscellaneous Cost
7. From the Used With drop down menu, select a marketing object:

- 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 a calculation method.
 11. Select Summarize Metrics:
 - Summarize to Parent: Not available for a summary metric.
 - 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. Select Create to save your work.

8.5 Creating a Manual Metric

A manual metric receives values from user input. Manual metrics are entered by hand into the system.

For example, an Oracle Marketing Administrator can create a manual metric for the Venue Object called "Venue Cost". This enables a marketer who is using the application to manually enter costs associated with Venues

- Each manual metric can be assigned to an object multiple times. A transaction date and description distinguishes each entry.
- 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.

A manual metric receives values from user input. Manual metrics are entered by hand into the system.

For example, an Oracle Marketing Administrator can create a manual metric for the Venue Object called “Venue Cost”. This enables a marketer who is using the application to manually enter costs associated with Venues.

To create a Manual Metric, follow the procedure below:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > General > Metric.
3. Select Create.
4. In the General Information Section, enter the following details:
 - Name: Give the metric a name, for example, Venue Cost.
 - Enabled: Select to enable the metric.
 - Category: In the drop-down menu, choose a category to associate the Metric with. For example, Cost.
 - Used With: Select the Marketing Object that will use the Metric. For example, Event. In this example, Event is the Marketing Object because Venue is an attribute of the Event Object.
 - Description: Enter a meaningful description for this metric.
5. In the Calculation section select Enter Values Manually.
6. In the Summarize To section select a Parent level/and or Same Level object.

This step is optional and need only be performed if the manual metric being created is to be Rolled up to a parent or Summarized at same level.

7. Select Create to save your work.

A confirmation appears indicating the metric has been created.

8.5.1 Associating a Manual Metric with a Marketing Object

After the metric is created a marketer can use the metric to measure.

Use the following procedure to associate the manual metric with the Marketing Event Object.

Prerequisites

Metric has been created for Object being associated with

Steps

1. Log in to Oracle Marketing.
2. Navigate to Event > Events > Essential > Costs and Revenues.
The Event - Costs and Revenues page opens. This is where the “Cost” metrics are located.
3. In the Create New section enter the following:
 - **Name Column:** Use the flashlight icon to search for the appropriate Manual Metric.
 - **Forecast Column:** Manually enter forecasted cost values.
 - **Actual Column:** Manually enter actual cost values.
 - **Transaction Date:** Manually enter a transaction date.
 - **Description:** Manually enter a description.
4. Select Create to save your work.

8.6 Creating a PL/SQL Program for Metrics

PL/SQL Program Metrics enables the Metrics Refresh Engine to interface with database stored procedures and functions. This allows for the implementation of customized logic for calculating metric values based on business needs. Each time

the Refresh Metric Engine is invoked, all PL/SQL Program metrics in the system are executed.

Two types of PL/SQL Program metrics are supported:

- **Procedure:** Procedure Metrics, based on database stored procedures, are executed once regardless of how many times it is used in the system. For example, seeded procedure metrics are used to calculate the number of leads generated from a campaign schedule. Each lead generated is assigned a source code that references a marketing object. The number of leads for a campaign schedule is determined by counting the number of leads with the same source code linked to the campaign schedule.
- **Function:** Function Metrics, based on database stored functions, are executed once for each usage. For example, if 10 Campaigns use the Function Metric, the function is executed 10 times.

For performance purposes, use of Procedure Metrics are highly recommended over Function Metrics. As the data grows the overhead of function metrics grows proportionally. Execution of the function is proportional to the number of instances of the function metric are attached to objects. Where as, procedure metrics are executed once per refresh no matter the size of data. The queries and other program logic are executed once to gather all the required data in bulk and then written in bulk to the activity metric table.

8.7 Setting Up Procedure Metrics

Procedure Metrics are intended for enabling metric value calculations to be performed in a batch mode. Because Procedure Metrics are expected to update metric values for multiple Marketing objects, the database bulk update features are used.

To understand and implement Procedure Metrics see the following:

- [Section 8.7.1, "Procedure Metric Overview"](#)
- [Section 8.7.2, "Anatomy of a Procedure Metric"](#)
- [Section 8.7.3, "Creating a Procedure Metric"](#)
- [Section 8.7.4, "Sample Procedure Metric for Calculating Leads"](#)
- [Section 8.7.5, "Calculation Logic"](#)
- [Section 8.7.6, "Using Bulk Collect and Update for Procedure Metric Queries"](#)

8.7.1 Procedure Metric Overview

The first select statement represents when the procedure metric is called by the **AMS – Metric Refresh program** concurrent program. This select statement queries for all activity metrics system wide that are relevant to this operation. The query is not specific to any marketing object.

The second select statement (within “ELSIF p_arc_act_metric_used_by = ‘CSCH’ THEN”) is for a specific object to update. In this case a campaign schedule. The query adds to the where clause for the specific object from the input parameters.

The output of these queries includes a list of activity metric ids and corresponding actual values. Bulk Collect is used to maximize the processing of the query. These results are passed to ‘UPDATE_ACTMETRICS_BULK’ to do a bulk update of the activity metrics table. This update also includes setting the dirty flag of the parent activity metrics to be refreshed.

A check should be made to prevent updating the actual value if it has not changed. For example, if the number of leads for a campaign schedule is 20 and on refresh the leads are calculated to be 20 again then do not update the activity metric. The list of activity metric ids and actual values should not include these items. If the activity metric is updated then the refresh engine will attempt to recalculate the rollup and summary metrics, thus wasting processing.

8.7.2 Anatomy of a Procedure Metric

A Procedure Metric must have the following parameters:

Table 8–3 Procedure Metric Parameters

Parameter Name	Data Type	Default Value
p_arc_act_metric_used_by	VARCHAR2	Null
P_act_metric_used_by_id	NUMBER	Null

8.7.3 Creating a Procedure Metric

This metric is executed once per refresh for each metric with the same procedure name. All values must be computed and saved in memory for a bulk update.

Procedure metrics are not supported for Cost or Revenue metrics. Once a cost metric has been posted to the budget the actual value cannot be updated. Currency conversions are expensive to process.

An API is used to perform the bulk update. Because of efficiency very little validation is performed.

Procedure Metric Sample

```
PROCEDURE run_metrics(p_arc_act_metric_used_by VARCHAR2 := NULL,
p_act_metric_used_by_id NUMBER := NULL)
IS
    l_actual_values_table num_table_type;
    l_activity_metric_id_table num_table_type;
BEGIN
    IF p_arc_act_metric_used_by IS NULL THEN
        SELECT NVL(actual_value, 0), activity_metric_id
        bulk collect INTO l_actual_values_table,
                        l_activity_metric_id_table
        FROM some_table
    ELSIF p_arc_act_metric_used_by = 'CSCH' THEN
        SELECT NVL(actual_value, 0), activity_metric_id
        bulk collect INTO l_actual_values_table,
                        l_activity_metric_id_table
        FROM some_table
        WHERE object_type = 'CSCH'
    END IF;
    update_actmetrics_bulk(l_activity_metric_id_table,
                          l_actual_values_table);
END;
```

See AMS_ACTMETRIC_SEED_PVT.Calculate_Seed_Metrics for a detailed use of Procedure Metrics.

To create a Procedure Metric follow the procedure below:

Prerequisite

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to the Administration > Marketing > General > Metric.
3. Select Create.
4. Enter the Metric name:

For example, choose: My Procedure Metric, Category - Response, Sub Category - none, Used With - Campaign Schedule, Return Value - Numeric, Description - optional. Select the Calculation 'Calculate Using Program', and enter the procedure name, 'SCHEMANAME.RUN_METRICS'. And, enter summary and rollup metrics at will.

5. Select Create.

Verify metric on the Overview page.

6. Navigate to the Campaign Schedule.

7. Assign this metric to the a Campaign Schedule.

This procedure is executed when either the refresh button is pressed or the concurrent metrics engine executes. Verify results with source tables.

8.7.4 Sample Procedure Metric for Calculating Leads

The following is a sample procedure Metric for Leads. This is an excerpt from package AMS_ACTMETRICS_SEED_PVT.

```
PROCEDURE Calculate_Seeded_Metrics(
    p_arc_act_metric_used_by VARCHAR2 := NULL,
    p_act_metric_used_by_id NUMBER := NULL)
IS
    l_actual_values_table Ams_Actmetrics_Seed_Pvt.num_table_type;
    l_activity_metric_id_table Ams_Actmetrics_Seed_Pvt.num_table_type;
BEGIN
    -- Get all object data to update.
    IF p_arc_act_metric_used_by IS NULL THEN
        SELECT NVL(actual_value, 0), activity_metric_id
        bulk collect
        INTO l_actual_values_table, l_activity_metric_id_table
        FROM
            (SELECT actual_value, activity_metric_id
            FROM(
                --R9 Campaign Schedule/Leads
                SELECT
                /*+ index(X AS_SALES_LEADS_N4)
                 index(B ams_campaign_schedules_b_u1)
                 index(ALB ams_metrics_all_b_n3)
                 index(c ams_source_codes_u2)
                 index(Y as_statuses_b_u1)
                 index(AL AMS_ACT_METRICS_ALL_N5)*/
                COUNT(1) actual_value, AL.activity_metric_id,
```

```

        AL.func_actual_value
FROM ams_campaign_schedules_b B, ams_source_codes C,
     as_sales_leads X, as_statuses_b Y,
     ams_act_metrics_all AL, ams_metrics_all_b ALB
WHERE X.status_code = Y.status_code
AND B.schedule_id = C.source_code_for_id
AND C.arc_source_code_for = 'CSCH'
AND Y.lead_flag = 'Y'
AND Y.enabled_flag = 'Y'
AND B.source_code = C.source_code
AND X.source_promotion_id = C.source_code_id
AND NVL(X.DELETED_FLAG,'N') <> 'Y'
AND AL.arc_act_metric_used_by = 'CSCH'
AND AL.act_metric_used_by_id = B.schedule_id
AND AL.metric_id = ALB.metric_id
AND ALB.metric_category = 906 -- Leads
AND ALB.function_name
     = 'AMS_ACTMETRICS_SEED_PVT.CALCULATE_SEEDED_METRICS'
AND ALB.metric_calculation_type = 'FUNCTION'
GROUP BY AL.activity_metric_id, AL.func_actual_value)
WHERE NVL(actual_value,0) <> NVL(func_actual_value,-1)
);
ELSIF p_arc_act_metric_used_by = 'CSCH' THEN
SELECT NVL(actual_value, 0), activity_metric_id
bulk collect
INTO l_actual_values_table, l_activity_metric_id_table
FROM (
SELECT actual_value, activity_metric_id
FROM(
--R9 Campaign Schedule/Leads
SELECT
/*+ index(X AS_SALES_LEADS_N4)
     index(B ams_campaign_schedules_b_u1)
     index(ALB ams_metrics_all_b_n3)
     index(C ams_source_codes_u2)
     index(Y as_statuses_b_u1)
     index(AL AMS_ACT_METRICS_ALL_N5)*/
COUNT(1) actual_value, AL.activity_metric_id,
        AL.func_actual_value
FROM ams_campaign_schedules_b B, ams_source_codes C,
     as_sales_leads X, as_statuses_b Y,
     ams_act_metrics_all AL, ams_metrics_all_b ALB
WHERE X.status_code = Y.status_code
AND B.schedule_id = C.source_code_for_id
AND C.arc_source_code_for = 'CSCH'

```

```

AND Y.lead_flag = 'Y'
AND Y.enabled_flag = 'Y'
AND B.source_code = C.source_code
AND X.source_promotion_id = C.source_code_id
AND NVL(X.DELETED_FLAG,'N') <> 'Y'
AND AL.arc_act_metric_used_by = 'CSCH'
AND AL.act_metric_used_by_id = B.schedule_id
AND AL.metric_id = ALB.metric_id
AND AL.ACT_METRIC_USED_BY_ID = p_act_metric_used_by_id
AND ALB.metric_category = 906 -- Leads
AND ALB.function_name =
    'AMS_ACTMETRICS_SEED_PVT.CALCULATE_SEEDED_METRICS'
AND ALB.metric_calculation_type = 'FUNCTION'
GROUP BY AL.activity_metric_id, AL.func_actual_value
)
WHERE NVL(actual_value,0) <> NVL(func_actual_value,-1)
);
END IF;
update_actmetrics_bulk(l_activity_metric_id_table,
                      l_actual_values_table);
END Calculate_Seeded_Metrics;

```

Local Variables

Two PL/SQL tables are needed to “bulk” capture the activity_metric_id and the calculated values corresponding to the ID's. The two tables should be of type num_table_type from the package ams_actmetrics_seed_pvt:

- l_values_tab Ams_Actmetrics_Seed_Pvt.num_table_type;
- l_ids_tab Ams_Actmetrics_Seed_Pvt.num_table_type;

8.7.5 Calculation Logic

The body of the procedure consists of code to select the values from a business-specific table. The business table needs to be able to join with a corresponding Marketing object table, such as Campaigns.

The activity metric table includes the id and object type of the corresponding object. For a campaign the field arc_act_metric_used_by is 'CAMP' and act_metric_used_by_id is the campaign id.

Table 8–4 Object Type

Object Type	Object Code	Table Column and Reference
Campaign	CAMP	AMS_CAMPAIGNS_ALL_B.CAMPAIGN_ID
Campaign Schedule	CSCH	AMS_CAMPAIGN_SCHEDULES_B.SCHEDULE_ID
Event	EVEH	AMS_EVENT_HEADERS_ALL_B.EVENT_HEADER_ID
Event Schedule	EVEO	AMS_EVENT_OFFERS_ALL_B.EVENT_OFFER_ID
One-Off Event	EONE	AMS_EVENT_OFFERS_ALL_B.EVENT_OFFER_ID
Deliverable	DELV	AMS_DELIVERABLES_ALL_B.DELIVERABLE_ID
Dialog	DILG	AMS_DIALOGS_ALL_B.DIALOG_ID

Within the object the specific relevant metrics can be referenced by the metric_id. Thus to write the select statement the where clause includes

- WHERE Actmetric.Arc_act_metric_used_by = <object_code>
- AND actmetric.act_metric_used_by_id = <object_id>
- AND actmetric.metric_id = <metric_id>

Where the object_id is a join to the business table that references the marketing object. The metric_id needs to match the procedure metrics' id. To find the correct metric id query the metric table for the matching procedure name. For example:

- SELECT metric_id, metrics_name, arc_metric_used_for_object
- FROM ams_p_metrics_v
- WHERE FUNCTION_NAME = 'RUN_METRICS' — User upper case.

8.7.6 Using Bulk Collect and Update for Procedure Metric Queries

Procedure metric queries must utilize 'BULK COLLECT' feature of PL/SQL to maximize performance. Bulk Collect minimizes the amount of context switching required by fetching values one at a time. Bulk Collect changes context to SQL to read in all values to PL/SQL arrays, which reduces context switching to once. After the data is fetched, the procedure must execute the bulk update procedure:


```
Ams_Actmetrics_Seed_Pvt.update_actmetrics_bulk (
    l_activity_metric_ids_tab,
    l_actual_values_tab);
```

8.8 Setting Up Function Metrics

Function metrics execute the PL/SQL function for each instance of the activity metric on the system. The return value of a number is the actual value for the activity metric to update.

To understand and implement Function Metrics see the following:

- [Section 8.8.1, "Function Metric Overview"](#)
- [Section 8.8.2, "Anatomy of a Function Metric"](#)
- [Section 8.8.3, "Sample Activity Function Metric"](#)
- [Section 8.8.4, "Creating a Function Metric"](#)

8.8.1 Function Metric Overview

The stored PL/SQL function or procedure name must be the full name which includes the schema name, package name, and module name (if applicable). Function metrics are similar to a manual metric leaf level metric, data values are entered, however, difference forecasted (marketing is expending) values vs. actual (what they actually spend).

A Function metric is executed once for each assigned metric to a marketing object. The parameter for the function is the activity metric id, which distinctly references the marketing object.

For the marketing object specification - use the following query parameters:

- Table: AMS_ACT_METRICS_ALL
- Object type: ARC_ACT_METRIC_USED_BY
- Object id: ACT_METRIC_USED_BY_ID

The function metric returns the actual value to be set. In the case of Cost and Revenue metrics the actual value must be in the 'Default Currency'. (Use Fnd_Profile.Value ('AMS_DEFAULT_CURR_CODE') to derive the default currency). For Costs, once the cost is posted to a budget the actual value cannot be updated.

Because function metrics are executed once per object and the value is updated one at a time, this method is very slow when processing thousands of metrics.

8.8.2 Anatomy of a Function Metric

The parameters include the activity metric id. Each execution of this function is for a single activity metric to retrieve the current actual value. The activity metric id is passed as the parameter. With this activity metric id the all the information about the activity metric can be accessed including the relevant object and current values. The actual value calculation may include counting a number of items, such as leads, or totaling values such as revenue.

8.8.3 Sample Activity Function Metric

he value returned is updated in the corresponding AMS_ACT_METRICS_ALL record. Currency conversion is performed for Cost and Revenue metrics.

```
FUNCTION run_metric(p_activity_metric_id IN NUMBER)
RETURNS NUMBER
IS
    l_actual_value NUMBER;
BEGIN
    -- Query actual value
    SELECT actual_value
    INTO l_actual_value
    FROM business, ams_act_metrics_all actmetric
    WHERE actmetric.activity_metric_id = p_activity_metric_id
    AND business.id = actmetric.act_metric_used_by_id;
    RETURN l_actual_value;
END;
```

8.8.4 Creating a Function Metric

To create a Function Metric (using the example above), use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > General > Metric.
3. Select Create.
4. In the General Information Section, enter the following details:

- Name: Give the metric a name, for example, Function_Test.
 - Enabled: Select to enable the metric.
 - Category: In the drop-down menu, choose a category to associate the Metric with. For example, Cost.
 - Used With: Select the Marketing Object that will use the Metric. For example, Campaign.
 - Description: Enter a meaningful description for this metric.
5. In the Calculation section, select Calculate Using Program. Enter the schema, package, and function name.
 6. In the Summarize To section select a Parent level/and or Same Level object.

This step is optional and need only be performed if the manual metric being created is to be Rolled up to a parent or Summarized at same level.

8.9 Creating Rollup Metrics

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.

Manual and Function Metrics are assigned to a Rollup Metric, therefore 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.

For example, you may want to establish a venue cost at the Event schedule level. To view venue costs across multiple Event Schedules, a rollup metric called “Rolled-up Venue cost” can be created for the “Venue cost” manual metric. The rollup metric will appear at the Event and program levels totaling all 'Venue Costs' from the Event schedules.

To create a Rollup Metric follow the procedure below:

Prerequisite

None

Steps

1. Log in to Oracle Marketing.
2. Navigate to the Administration > Marketing > General > Metric.
3. Select Create.
4. Enter the Metric name.
5. Select calculation type Rollup.
6. Select Create.
7. To have the rollup metric continue to rollup the marketing object hierarchy, set the “Summarize to: of the parent” to this same rollup metric.
8. Set: Summarize to: at the same level” to the desired summary metric to total at the same object level.
9. Select Update to save your work.

8.10 Creating Variable Metrics

Variable metrics determine the actual value by multiplying a unit value times the actual value of a “multiplier metric”. Variable metrics may only have Cost or Revenue categories.

When creating a variable metric it is required to select the “multiplier metric”. This multiplier metric can be any manual or function metric with the same 'Used With' and not a Cost or Revenue.

When the variable metric is assigned to a marketing object the multiplier metric is also assigned (if not already present). When the metrics are refreshed the actual value is updated.

For example, “postage costs” can be associated to a number of people in a target group (contacts). To contact them you have a mailer you sent out, and postage for this is .37/person. You have 500 people in the target contact group. The variable metric takes .37 and multiplies it by the # of people in your contact group.

Prerequisite

The multiplier metric must be defined before creating the variable metric

Steps

1. Log in to Oracle Marketing.
1. Navigate to the Administration > Marketing > General > Metric.
2. Select Create.
3. Select category of Cost or Revenue.
4. Set Used with to the appropriate object type.
5. Set Calculation to 'Calculate using Metric'.
6. Select the multiplier metric from the LOV next to 'Calculate using Metric'.
7. Select summarize to parent, and same level as required.
8. Select Create to save and update your changes.

Confirmation page is displayed.

8.11 Associating Metrics to Marketing Objects

You can create metrics for any object that exists in the Oracle Marketing application. After the metric has been created by the Administrator, the marketer will use the metric in association with the Campaign object being measured.

For example, if a Manual Metric called “total cost” has been created for the Campaign Object, a marketer will simply navigate to the Campaign Details page and select Metric. The Manual Metric “total cost” will be available and will be associated to the Campaign Object by the marketer.

8.12 Running the Metrics Concurrent Program

After implementing any type of metric, the concurrent manager for metrics must be set up. The Metrics Refresh Engine utilizes PL/SQL features to quickly, and correctly roll up values.

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 broken into 2 parts: Rollups and Summaries.
- Update History is optionally performed as indicated by an input parameter.

The following steps are made in the refresh process:

Prerequisite

Metric is properly set up

Steps

1. Log in to Oracle Forms as Oracle Marketing Administrator.
2. Navigate to Applications > Functions > Setups > Concurrent Requests.
3. Select Submit a New Request.
4. Select the Concurrent Manager Program: AMS - Metrics refresh program.
5. Schedule the program to execute at least once daily.
6. Update History.
 - Metric history records the activity metric records on a daily basis. History is recorded by the AMS: Metric Refresh Program only when the Update_history flag is set to Yes.
 - The refresh must be executed on a daily basis for the history to be recorded. If Update_History has been set to No, then no history will be recorded. The history is recorded for each metric as a single record for a given day. If the metric record is updated more than once in a day, only the last value of that day is recorded. If a metric is not updated on a given day then no history is recorded.
 - The history can be shown by the history section on the Metrics and Cost & Revenue cue cards. Select the Metric Name, Start and End dates, Interval Value Type (cumulative or incremental), then select View History to show a

table of values and charts. Recording history is required for support of Business Intelligence for Marketing (BIM).

7. Save your work.

8.13 Setting Metric Profile Options

To maximize metric performance, set the profile **AMS : Batch Size** at **site** level. This profile takes an integer that represents the maximum number of records to save in a batch. This helps tune the performance of the metric refresh program. By setting this profile, when updates or inserts are performed, they are limited to the batch size. This prevents the rollback segment from becoming too big and saves any intermediate processing. If the program fails then not all the work would be lost. The refresh would start from where it left off. The batch processing is written to prEvent committing any corrupt state.

8.14 Setting Up Metric Templates

Metric templates enable an organization to standardize the metrics to be associated with a marketing activity upon creation of the activity. Metrics within metric templates defined for campaign schedules are automatically associated to the new campaign schedule.

To understand and implement Metric Templates see the following sections:

- [Section 8.14.1, "Creating a Metric Template"](#)
- [Section 8.14.2, "Enabling Metric Templates"](#)
- [Section 8.14.3, "Using Metric Templates"](#)

8.14.1 Creating a Metric Template

To create a Metric Template use the procedure below:

Prerequisites

Metric is defined

Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Metric Templates.

The Metric Template overview page opens, it contains a list of all metric templates defined on the system. On the overview page templates can be enable or disabled as required.

3. Select Create.

The Metric Template Create page opens, enter the following information:

- **Name:** Enter a name for the template. The metric name value must correlate with the Marketing Object it is associated with.
- **Enabled:** Select whether to have the template enabled on creation.
- **Description:** Enter a description for the template.

4. Select Create.

5. Select the set of metrics to include in the template.

- These metrics include all function and manually entered metrics, no matter what the 'Used With' is, (Summary and Rollup metrics are not required because they are automatically assigned as required by the hierarchy.)
- The metrics are only assigned to the appropriate object type as defined within the metric. These metrics are assigned only if the association conditions are met.

6. Select View Associations.

- This shows what types of object these metrics can be assigned to. The associations include defining which object types or custom setups these metrics are assigned to on creation.
- If an object type is defined, all objects of that type will have assigned the contained metrics. If custom setups are defined then the metrics are assigned to objects created with the corresponding setup. Only the metrics with the corresponding 'Used With' object type of the object being created are assigned to the new object.
- Object type associations override custom setup associations for the same object type. If an object type association is defined the all objects of that type are assigned the metrics, regardless of any custom setup associations defined for that object type.

7. Select Update to save your work.

8.14.2 Enabling Metric Templates

Enabling occurs at each level of the metric template. The entire template is enabled or disabled, or each metric individually, or each association. If the template is disabled then the associations and metrics within are ignored. If metrics are disabled within the template then those metrics are not assigned (at least because of this template, but another template still could assign that metric).

If an association is disabled then the metrics are not assigned for that condition. This allows the administrator to turn on and off assignment without deleting and adding to the definition. If the metric itself is disabled the metric is also not assigned.

8.14.3 Using Metric Templates

Usage of a metric template is transparent to the marketer creating the business object. When the marketing object is created the metric templates are all searched to generate a composite list of metrics to assign. The metrics are required to have the same 'Used With' object type as the new business object. The metrics must be enabled at the metric definition. The template, association type, and included metric all must be enabled to assign the metric. If duplicates of a metric are found across the templates only one metric is assigned to the object.

For more information about using Metric Templates see the *Oracle Marketing User's Guide*.

8.15 Seeded Metrics Reference

A number of commonly used marketing metrics, such as Total Cost, Total Revenue, Responses Count and Event Registrants, are included in with the deployment of the Marketing application. The following is a listing of the metrics which are selectable for association to specific marketing activities/objects.

Table 8–5 Seeded Metrics

Metric Name	Metric Id	Used With Object	Calculation Type	Category	Metric Parent Id	Summary Metric Id
Total Campaign Cost	1	Any	Summary	Cost		
Total Campaign Direct Cost	2	Any	Summary	Cost		1
Rolled-up Campaign Deliverable Cost	3	Any	Rollup	Cost	3	2

Table 8–5 Seeded Metrics

Rolled-up Campaign Event Cost	4	Any	Rollup	Cost	4	2
Rolled-up Campaign Cost	5	Any	Rollup	Cost	5	57
Total Campaign Indirect Cost	6	Any	Summary	Cost		1
Total Campaign Revenue	7	Any	Summary	Revenue		
Rolled-up Campaign Revenue	8	Any	Rollup	Revenue	8	62
Total Campaign Response	9	Any	Summary	Response		
Campaign Response	10	Campaign	Manual	Response	11	64
Rolled-up Campaign Response	11	Any	Rollup	Response	11	64
Total Campaign Schedule Cost	12	Any	Summary	Cost		
Total Campaign Schedule Direct Cost	13	Any	Summary	Cost		12
Rolled-up Campaign Schedule Deliverable Cost	14	Any	Rollup	Cost	14	13
Rolled-up Campaign Schedule Event Cost	15	Any	Rollup	Cost	15	13
Direct Cost	16	Campaign Schedule	Manual	Cost	171	57
Total Campaign Schedule Indirect Cost	17	Any	Summary	Cost		12
Total Campaign Schedule Revenue	18	Any	Summary	Revenue		
Revenue	19	Campaign Schedule	Manual	Revenue	8	62
Total Campaign Schedule Response	20	Any	Summary	Response		
Response	21	Campaign Schedule	Manual	Response	11	64
Total Event Cost	22	Any	Summary	Cost		
Total Event Direct Cost	23	Any	Summary	Cost		22
Rolled-up Event Deliverable Cost	24	Any	Rollup	Cost	24	22

Table 8–5 Seeded Metrics

Rolled-up Event Campaign Cost	25	Any	Rollup	Cost	25	23
Rolled-up Event Cost	26	Any	Rollup	Cost	26	57
Total Event Indirect Cost	27	Any	Summary	Cost		22
Total Event Revenue	28	Any	Summary	Revenue		
Rolled-up Event Revenue	29	Any	Rollup	Revenue	29	62
Total Event Response	30	Any	Summary	Response		
Event Response	31	Event	Manual	Response	32	64
Rolled-up Event Response	32	Any	Rollup	Response	32	64
Total Event Schedule Cost	33	Any	Summary	Cost		
Total Event Schedule Direct Cost	34	Any	Summary	Cost		33
Rolled-up Event Schedule Deliverable Cost	35	Any	Rollup	Cost	35	34
Rolled-up Event Schedule Campaign Cost	36	Any	Rollup	Cost	36	34
Direct Cost	37	Event Schedule	Manual	Cost	172	57
Total Event Schedule Indirect Cost	38	Any	Summary	Cost		33
Total Event Schedule Revenue	39	Any	Summary	Revenue		
Revenue	40	Event Schedule	Manual	Revenue	29	62
Total Event Schedule Response	41	Any	Summary	Response		
Response	42	Event Schedule	Manual	Response	32	64
Total Deliverable Cost	43	Any	Summary	Cost		
Total Deliverable Direct Cost	44	Any	Summary	Cost		43
Creative Cost	45	Deliverable	Manual	Cost		57
Other Cost	46	Deliverable	Manual	Cost		57
Postage Cost	47	Deliverable	Manual	Cost		57

Table 8–5 Seeded Metrics

Total Deliverable Indirect Cost	48	Any	Summary	Cost		43
Total Deliverable Revenue	49	Any	Summary	Revenue		
Revenue	50	Deliverable	Manual	Revenue		62
Total Deliverable Response	51	Any	Summary	Response		
Response	52	Deliverable	Manual	Response		64
Other Cost	53	Campaign	Manual	Cost	5	57
Other Cost	54	Event	Manual	Cost	26	57
Allocation	55	Campaign	Allocation	Allocation		
Total Cost	56	Any	Summary	Cost		
Total Direct Cost	57	Any	Summary	Cost		56
Rolled-up Deliverable Cost	58	Any	Rollup	Cost	58	57
Rolled-up Event Program Cost	59	Any	Rollup	Cost	59	57
Rolled-up Cost	60	Any	Rollup	Cost	60	57
Total Indirect Cost	61	Any	Summary	Cost		56
Total Revenue	62	Any	Summary	Revenue		
Rolled-up Revenue	63	Any	Rollup	Revenue	63	62
Total Response	64	Any	Summary	Response		
Rolled-up Response	65	Any	Rollup	Response	65	64
Campaign Response	66	Program	Manual	Response	65	64
Other Cost	67	Program	Manual	Cost	60	57
Allocation	68	Program	Allocation	Allocation		
Total One-Off Event Cost	69	Any	Summary	Cost		
Total One-Off Event Direct Cost	70	Any	Summary	Cost		69
Rolled-up One-Off Event Deliverable Cost	71	Any	Rollup	Cost	71	70
Rolled-up One-Off Event Campaign Cost	72	Any	Rollup	Cost	72	70
Direct Cost	73	One-Off Event	Manual	Cost	173	57

Table 8–5 Seeded Metrics

Total One-Off Event Indirect Cost	74	Any	Summary	Cost		69
Total One-Off Event Revenue	75	Any	Summary	Revenue		
Revenue	76	One-Off Event	Manual	Revenue	174	62
Total One-Off Event Response	77	Any	Summary	Response		
Response	78	One-Off Event	Manual	Response	175	64
Total Leads	81	Any	Summary	Leads		
Rolled-up Campaign Leads	82	Any	Rollup	Leads	82	81
Leads	83	Campaign Schedule	Function	Leads	82	81
Leads	84	Event Schedule	Function	Leads	86	81
Leads	85	One-Off Event	Function	Leads	87	81
Rolled-up Event Leads	86	Any	Rollup	Leads	86	81
Rolled-up One-Off Event Leads	87	Any	Rollup	Leads	87	81
Total Opportunities	91	Any	Summary	Opportunities		
Rolled-up Campaign Opportunities	92	Any	Rollup	Opportunities	92	91
Opportunities	93	Campaign Schedule	Function	Opportunities	92	91
Opportunities	94	Event Schedule	Function	Opportunities	96	91
Opportunities	95	One-Off Event	Function	Opportunities	97	91
Rolled-up Event Opportunities	96	Any	Rollup	Opportunities	96	91
Rolled-up One-Off Event Opportunities	97	Any	Rollup	Opportunities	97	91
Total Orders Amount	101	Any	Summary	Orders Amount		

Table 8–5 Seeded Metrics

Rolled-up Campaign Orders Amount	102	Any	Rollup	Orders Amount	102	101
Orders Amount	103	Event Schedule	Function	Orders Amount	106	101
Orders Amount	104	One-Off Event	Function	Orders Amount	107	101
Orders Amount	105	Campaign Schedule	Function	Orders Amount	102	101
Rolled-up Event Orders Amount	106	Any	Rollup	Orders Amount	106	101
Rolled-up One-Off Event Orders Amount	107	Any	Rollup	Orders Amount	107	101
Total Registrants	121	Any	Summary	Registrants		
Rolled-up Event Registrants	122	Any	Rollup	Registrants	122	121
Registrants	123	Event Schedule	Function	Registrants	122	121
Registrants	124	One-Off Event	Function	Registrants	125	121
Rolled-up One-Off Event Registrants	125	Any	Rollup	Registrants	125	121
Total Attendees	131	Any	Summary	Attendees		
Rolled-up Event Attendees	132	Any	Rollup	Attendees	132	131
Attendees	133	Event Schedule	Function	Attendees	132	131
Attendees	134	One-Off Event	Function	Attendees	135	131
Rolled-up One-Off Event Attendees	135	Any	Rollup	Attendees	135	131
Total Cancellations	141	Any	Summary	Cancellations		
Rolled-up Event Cancellations	142	Any	Rollup	Cancellations	142	141
Cancellations	143	Event Schedule	Function	Cancellations	142	141

Table 8–5 Seeded Metrics

Cancellations	144	One-Off Event	Function	Cancellations	145	141
Rolled-up One-Off Event Cancellations	145	Any	Rollup	Cancellations	145	141
Total Orders Count	151	Any	Summary	Orders Count		
Rolled-up Campaign Orders Count	152	Any	Rollup	Orders Count	152	151
Rolled-up Event Orders Count	153	Any	Rollup	Orders Count	153	151
Rolled-up One-Off Event Orders Count	154	Any	Rollup	Orders Count	154	151
Orders Count	155	Campaign Schedule	Function	Orders Count	152	151
Orders Count	156	Event Schedule	Function	Orders Count	153	151
Orders Count	157	One-Off Event	Function	Orders Count	154	151
Total Responses Count	161	Any	Summary	Response		
Rolled-up Campaign Responses Count	162	Any	Rollup	Response	162	161
Rolled-up Event Responses Count	163	Any	Rollup	Response	163	161
Rolled-up One-Off Event Responses Count	164	Any	Rollup	Response	164	161
Responses Count	165	Campaign Schedule	Function	Response	162	161
Responses Count	166	Event Schedule	Function	Response	163	161
Responses Count	167	One-Off Event	Function	Response	164	161
Rolled-up Campaign Direct Cost	171	Any	Rollup	Cost	171	57
Rolled-up Event Direct Cost	172	Any	Rollup	Cost	172	57

Table 8–5 Seeded Metrics

Rolled-up One-Off Event Direct Cost	173	Any	Rollup	Cost	173	57
Rolled-up One-Off Event Revenue	174	Any	Rollup	Revenue	174	62
Rolled-up One-Off Event Response	175	Any	Rollup	Response	175	64
Rolled-up Campaign Indirect Cost	176	Any	Rollup	Cost	176	17
Rolled-up Event Indirect Cost	177	Any	Rollup	Cost	177	38
Rolled-up One-Off Event Indirect Cost	178	Any	Rollup	Cost	178	74

Profile Options

This chapter describes profile option settings that are required for successful implementation.

Topics include:

- [Section A.1, "Before You Begin"](#)
- [Section A.2, "Setting Profile Options"](#)
- [Section A.3, "Oracle Marketing System Profiles"](#)

A.1 Before You Begin

Before making Oracle Forms settings, ensure that all Oracle Applications server processes are up and running. In particular, if you stopped concurrent managers before applying Oracle Applications patchsets, restart them now by changing to `$COMMON_TOP/admin/scripts`, and executing `adcmctl.sh <APPS username/APPS password> start`.

A.2 Setting Profile Options

Use the following procedure to set any profile option.

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Go to **Profile > System**.
The Find System Profile Values window opens.
3. Check the level(s) at which you want to set the profile option. The available levels are listed below:
 - **Site** -
 - **Application**—If you select this level, choose the application from the Application LOV for which you want to set the profile option.
 - **Responsibility**—If you select this level, choose the responsibility from the Responsibility LOV for which you want to set the profile option.
 - **User**—If you select this level, choose the user from the User LOV for whom you want to set the profile option.
4. In the Profile field, enter the profile name, such as `AMS: Default Percent Formula`, or a wildcard search criterion such as `AMS%`.
5. Click **Find**.
The System Profile Values form opens with the results of your search.
6. Verify or set the profile option(s) at the levels that you selected.
7. Field and Variable Values window, choose **APPLICATION_ID** from the Field LOV.

The Value field in the Examine Field and Variable Values window is populated with the value of `APPLICATION_ID`.

8. In the Examine Field and Variable Values window, choose **RESPONSIBILITY_ID** from the Field LOV.

The Value field in the Examine Field and Variable Values window is populated with the value of RESPONSIBILITY_ID.

A.3 Oracle Marketing System Profiles

The following table displays system profile options used by Oracle Marketing.

Table A-1 Oracle Marketing Profile Options

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	No	Site Appl Resp User	Yes/No	If set to Yes , the committed amount for a budget can exceed its total budget amount. If set to No , the committed amount may not exceed the total budget amount. Set to no if you intend to use budget not just for sourcing but also for imposing financial control over budgetary usage.
AMS : Allow Recalculation of Committed Budget	No	Site	Yes/No	Re-Calculated Committed is an option to re-calculate the necessary funding level based on the actual sales performance of a promotion (i.e. offer). Funds can be increased or decreased. If the promotion performs well, funding can be automatically increased, and vice versa. If set to Yes the concurrent process(for recalculate commit) will perform re-calculation of offers' committed amounts. If set to No re-calculation will not be performed. Users are still able to see the Re-Calculated Committed budget column, it will simply be equal the Committed column.

Table A-1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS : Allow updates to Price Lists created in Advanced Pricing from Oracle Marketing Online	Yes	Responsibility	Yes/No	Selecting Yes will allow Price lists created using Advanced Pricing can be edited in Oracle Marketing Online.
AMS : Allow Un-Related ShipTo On Claims	No	Site	Yes/No	This profile determines whether the ship to site can be un-related to the bill to site. In both Order Management and in AR this is possible. For example, the bill-to and ship-to may have absolutely no relationship set up. Since TM integrates closely with these two, a similar profile is provided.
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 : AR Credit Method For Rule	Yes	Site Resp	Credit method values from AR	Determines who revenue and transaction line balances will impact when TM creates an invoice credit to settle a deduction. The selections are passed to AR.
AMS : AR Credit Method For Installment	Yes	Site Resp	Credit method values from AR	Determines who revenue and transaction line balances will impact when TM creates an invoice credit to settle a deduction. The selections are passed to AR.
AMS: Budget has Grace Period	No	Site Appl Resp User	Yes/No	Yes indicates that budgets can have grace periods.

Table A–1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS : Budget Adjustment Grace Period in Days	No	Site Appl Resp User	Enter any integer (for number of days)	Budget reconciliation may be performed manually or automatically. ■ If automatic: The "AMS-TM: Release Committed Budget Amount After Grace Period concurrent program is used to reconcile budgets. This program waits before reconciling the sourced budgets of an object after the closing date of the object. ■ If manual: The offer is evaluated on a case by case basis. Use automatic if you would like to systematically reconcile the budgets.
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 : Claim Write Off Threshold	No	Site Appl Resp User		This write-off threshold is defined as the difference between the total and the settlement value returned from AR. For an invoice related deduction, if the difference amount (Claim amount less the AR credit memo amount) is less than this write-off threshold amount, Trade Management will automatically create a write-off claim line and create a negative adjustment to the invoice.
AMS : Confirmation URL	Yes	Site	URL	Contact preferences can be updated by the user using self service pages which are invoked by updating the contact preferences link in an e-mail text body. Once the user updates the contact preferences he or she is redirected to the page specified in this profile.
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

Table A–1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS: Cut Off Percentage for Approval	No	Site	Enter any number (for percentage)	This determines what percentage of the estimated budget amount an object must secure in actual funding before the object can go active. For example, if you enter 100, it means 100%. An offer's estimated budget amount is \$10K, meaning that it is estimated that this offer must get budget approved for \$10K before the offer can go active. This applies only to a Trade Management implementation.
AMS : Implement Contra Charge Payment Method	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 : Currency Conversion Type	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 : Cut off percentage for Approvals	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 : Data Mining Engine Output Schema	Yes	Site	Free form text corresponding to the scoring output schema.	The scoring run result processing program will use the scheme specified to fetch the results.

Table A–1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS : Data Mining Engine Property File	Yes	Site	Free form text corresponding to the location of the property file created in Section 5.4.1, "Setting up the ODM Property File"	The Java Concurrent Program will use the property file indicated in the profile option value to invoke program settings by calling ODM 9i APIs.
AMS : Data Mining Debug Enabled	No	User	Default value is No. When set to Yes, debug is turned on, when set to No, debug is turned off.	Enables debugging information to be written in the concurrent request log.
AMS : Default Amount Formula	Yes	Site	Supported Formulas	Used to set the default formula for discount rule. For example, if the value is set to "handling", then when changing the discount type to "amount", the value of the formula is set to "handling".
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	Site Appl Resp User	Choose a budget name from the list of available budgets	During budget request for all objects, users may decide to source from a Budget or from a Person. When sourcing is made to a person, the system will automatically default the budget name specified on this profile on to the budget request. Users will be able to change it on screen.
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.

Table A–1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS : Default Cust View	Optional	Site Appl Resp User	Yes/No	Default value is No . If set to Yes , a user can see the Budget Customer View from the Budget summary page.
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 Partner Budget	No	Site Appl Resp User	Choose a budget name from the list of available budgets	Default budget for a partner
AMS : Default Period in Days for recalculating committed budget	No	Site Appl Resp User	Enter any integer (for number of days)	This profile determines how often updates to Re-Calculated Committed are performed. Enter any number greater than or equal to one. For example: ■ If set to 1, Re-Calculated Committed change after 1 day. ■ If set to 2, Re-Calculated Committed change after 2 days.
AMS : Default Percent Formula	Yes	Site	Formulas Supported in Advanced Pricing	Used to set the default formula for a Discount Rule having Discount Type "Percent". For example, if the Value is set to "Handling" then when changing the Discount Type to "Percent" the value of Formula is set to "Handling".
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.

Table A-1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
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 Status for creating Task Templates	Optional	Site	Depends on JTF Task Statuses	If nothing is entered here, tasks will default to 'unassigned'.
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 precedence	Yes	Site	User Defined	Used as a default for all discount rules.
AMS : Default value for incompatibility group	No	Site Appl Resp User	Choose an incompatibility group from a list of available incompatibility groups set up in Advanced Pricing.	This profile only applies to fully accrued budget. Incompatibility Group is setup Advanced Pricing, it determines how promotions will be grouped together and which ones will be applied together with other promotions. Being that a fully accrued budget creates an offer in the background, and being that the offer will by default have this incompatibility group, this concerns a fully accrued budget. Users can change this defaulted value while setting up the fully accrued budget.

Table A–1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
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 Fulfillment	Optional	Site	Yes/No	Enables Oracle 1-to-1 Fulfillment Service Integration.
AMS : Enable Tip Text	Optional	User	Yes/No	Tip text will be displayed in the UI.
AMS : HZ Dedupe Rule	Optional	Site	Yes/No	Indicates whether deduplication rules are in effect for records placed into TCA.
AMS : Implement Contra Charge payment method	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 Client File Size	Yes	Site	Numeric value	Default value is 1000000. For Oracle Marketing List Import functionality, this value sets the file size limit in terms of bytes that can be uploaded by client.
AMS : Implement Payables	Yes	Site	Yes/No	If get to Yes, “Check” is a settlement option available when settling claims.
AMS : Implement Payables Integrations		Site Appl Resp User	Yes/No	This profile value will determine the availability of the “check” settlement method in Trade Management. A setting of Yes means that settlement by Check is available.
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.

Table A–1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS : Interaction Logging Enabled	Optional	Site		To enable click-through destination logging in Interaction History, each time a customer/prospect clicks the URL, set AMS : Interaction Logging Enabled at site level. If set to Yes, each click-through is logged in Interaction History, in the JTF Interaction History Tables. If set to No, each click-through is not logged. This logging trail tracks the following information from the click through: ■ Party-id ■ Campaign schedule source code ■ Time and Date of the click-through
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 : Inventory Item Update Allows	Optional	Site	Yes/No	Default value is no. a Marketer is able to update products created within the Oracle Marketing application. However, if a Marketer wants to be able update products from Oracle Inventory, set this value to Yes at Site level.
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 Prefix	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.

Table A–1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS : Marketing Calendar	Yes	Site	Accounting Setting	Seeded value for this profile is Null. he Calendar needs to be created and associated to this profile. For Oracle Marketing Objects, the time periods come from the marketing calendar. The Marketing Calendar setups are performed prior to implementing Oracle Marketing. For more information see Section 2.1, "Mandatory Dependency Overview"
AMS : Marketing to ODM Database Link	Yes	Site	All database links in the database.	This profile is only necessary if implementing ODM in a dual instance environment. The value of this profile options should be the name of the database link from the Oracle Marketing database instance to the ODM database instance. It allows Oracle Marketing to read scoring run results from the ODM results tables.
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. This option must be set before creating an affiliate site.
AMS : OA_Media Path	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 : Offer Confidential Flag	No	Site	Yes/No	Used to set default value for Confidential flag in Offer Creation form. For example, if setting to Yes, then every time an offer is created, it will default to confidential (which can be overridden).
AMS : Offer Discount Level	Yes	Site		Used to set default value for Offer discount level. For example if setting to Line, and minimum volume is 5, then each order line will have a minimum quantity of five to get a discount.

Table A–1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
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 : Queue : Marketing Lists - Manual Assignments	Optional	All	Yes/No	This profile determines if a user can work on Marketing Lists - Manual Assignments. This profile assigns the user a universal work queue. In UWQ you can enable or disable a note that is exposed by telesales.
AMS : Queue Order : Marketing Lists - Manual Assignments	Optional	All	Yes/No	This profile is only applicable when Oracle Marketing is integrated with Oracle Telesales. Determines the order of appearance for the Universal Work Queue. This is only applicable if the profile AMS : Queue : Marketing Lists - Manual Assignment is enabled.
AMS : Prefix to Registration Confirmation Code	Optional	Site	User Defined	Characters for the Event Registration Confirmation Code.
AMS : Pricelist Header Name for Events	Yes	Site	User defined entry	Enter the name of the default price list for Events.
AMS : Price Different Budget	No	Site Appl Resp User	Choose a budget from a list of available budgets	This is used for accruals created by the AMS-TM: Charge back Accruals concurrent process (which do not have any budgets assigned). The program imports sell-through sales data into TM, often for the purpose of forecasting or creating promotional accruals for indirect customers.
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.

Table A-1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
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	Optional	Site	User Defined	This value determines the runtime URL path of the server. Used to generate API details for affiliates during placement definition. This must be set before creating any affiliate placement definition. For example: http://YourHostName:PortNum
AMS : Scan Data UOM	Yes	Site	All possible UOM values	Used to set the default value for UOM in the Discount rules for Scan Data Offers. For example if you choose "Each" then each empty Discount Rule in Scan Data Offers will appear with UOM as "Each".
AMS : Should Call to Inventory Modules be Made?	Yes	Site	Yes/No	Indicates whether a deliverable or an Event may be created as an Oracle Inventory item.
AMS : Should call to Pricing Modules be Made?	Yes	Site	Yes/No	Indicates whether a deliverable or an Event may be priced.
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.
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.

Table A–1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
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 : Store Date in Qualifiers	Yes	Site	Yes/No	Used to specify the location to store date qualifiers in the offers. If this is set to Yes, the date qualifier (for example, shipping date) is stored in the qualifier. If the value is set to No, the date qualifier is stored in the header.
AMS : System Timezone	Yes	Site	Select the timezone the central server is in.	Timezones are defined in HZ_ TIMEZONES.
AMS : Universal Currency	Yes	Site	Choose any valid currency from a list of available currencies	This profile determines the currency for the rollup view. It allows the rollup view of a budget to display correctly by converting all entries to a single currency. Different users will, however, be able to see the Rollup View in different currencies based on the user level profile option JTF_PROFILE_DEFAULT_CURRENCY. (In other words, the universal currency profile is simply for storage in the background). Once set the profile should not be changed.
AMS : Update Claim Access	No	Site User	Yes/No	This profile controls whether non-claim owners AND non-claim team members get update or view access to the claims.
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).

Table A–1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
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 : Upgrade Complete Flag	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 : Validate Market and Product Eligibility Between Object and Budget	No	Site	Yes/No	Default value is No . If set to Yes , the product and marketing eligibility of an offer must fall within the targets of the budget. The eligibilities of a budget must include those of an offer. Even if different parameters are used for defining these eligibilities (e.g. budget uses Territories, but offer uses Customer), the validation procedure can still decide whether the offer falls within budget (e.g. budget says “US West” territory, offer says “Business World”, the procedure will figure out, based on the definition of the US West territory, whether it includes the customer Business World in it).
AMS : Validation Level	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.
BIM Month Period Type	Yes	System		Select the month period type defined on the Marketing Calendar.

Table A–1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
BIM Quarter Period Type	Yes	System		Select the quarter period type defined on the Marketing Calendar.
BIM Year Period Type	Yes	System		Select the year period type defined on the Marketing Calendar.
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	Application	Yes/No	Determines whether placements are displayed. Required only when implementing iStore.
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
JTF Home Page File Name	Optional	Site or Application	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 homepage.
JTF_FM_BASE_IMAGE_URL	Optional	Site	Host and port name of application installation instance	If adding images to templates this profile must be set at site level. When uploading images to be stored in the database, the application must be enabled to retrieve files from the database. This profile enables this retrieval. The value of this profile must be set to the same value as your application installation. For example: http://<host_name>:<port_number>/OA_HTML/

Table A-1 Oracle Marketing Profile Options

Option	Required	Level	Setting	Effect/Limitation
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.
OSO : Customer Access Privilege	Required	Resp	Full	Set this profile to Full in order to grant access the Venue subtab.
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	Responsibility	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	Responsibility	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	Application	User Defined	Specifies the default assignee status when creating or assigning a task.
Task Manager: Default Priority	Optional	Application	User Defined	Specifies the default task priority when creating a task.
Task Manager: Default Task Status	Optional	Application	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	Application	User Defined	Specifies the default task type when creating a task.

Summary of Lookup Settings

This chapter describes lookup values and settings that are required for successful implementation.

Topics include:

- [Section B.1, "Understanding Lookups"](#)
- [Section B.2, "Creating New Lookup Types"](#)
- [Section B.3, "Oracle Marketing Lookup Values and Settings"](#)

B.1 Understanding Lookups

Lookups supply many of the List of values (LOVs) in the Oracle Marketing User Interface. Most Lookups are predefined (seeded in the application), the seeded value can be left as is, or they can be customized to fit your business needs. Lookup values make choosing information quick and easy, they ensure that users enter only valid data into Oracle Marketing.

You can add new Lookups Values at any time. You can set the Enable Flag for a Value to No, so that it will no longer appear in the list of values, or you can use the Start and End Dates to control when a value will appear in a list.

B.2 Creating New Lookup Types

To create a new lookup type, add values to an existing lookup type, or prevent existing values from appearing in a lookup type, use the Application Utilities Lookups window. You must log out and log in again to see the effect of your changes.

To define a new Lookup type and Lookup value use the following procedure:

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator Responsibility.
2. Navigate to Application > Lookups.
3. Choose the access level for the lookup type.
4. Enter the lookup type.
5. Enter the user name of the lookup. This is the name that users will see from within the application.
6. Select the application in which the lookup will be used.
7. Optionally, add a description of the lookup type.
8. If you want to add lookup values specific to the security group/business group linked to your current responsibility, un-check the Global Security Group check box. Existing lookup values are available to all business groups.

9. Enter the code, meaning and optionally a description for each value. Leave the Tag column blank.
10. If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.
11. Save your work.

B.2.1 Adding Values to an existing Lookup

To add a new value to an existing Lookup use the following procedure:

Prerequisites

None

Steps

1. Query the lookup type to which you want to add a value.
You cannot add values if the access level is System.
2. If you want to add lookup values specific to the security group/business group linked to your current responsibility, un-check the Global Security Group check box. Existing lookup values are available to all business groups.
3. Enter the code, meaning and optionally a description for each value. Leave the Tag column blank.
4. If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.
5. Save your work.

B.3 Oracle Marketing Lookup Values and Settings

The following table lists the Lookup settings used by Oracle Marketing.

Table B–1 Oracle Marketing Lookup Values

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
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

Table B–1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
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
AMS_CAMPAIGN_ STATUS	System	Active Archived Available Cancelled Closed Completed Denied_BA Denied_TA New On_Hold Planning Submitted_Budget Approval Submitted_Theme Approval	Active Archived Available Cancelled Closed Completed Denied Budget Approval Denied Theme Approval New Active, but locked Planned Submitted for Budget Approval Submitted for Theme Approval
AMS_CLAIM_ CLASS	System	Claim Deduction	Claim Deduction
AMS_CLAIM_ HISTORY_ EVENT	System	Changes Line New Split	Changes Line New Split

Table B–1 Oracle Marketing Lookup Values

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_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

Table B-1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
AMS_CONTENT_TYPE	Extensible	HTML Text	HTML Text Used for email schedules
AMS_CREATION_SIGN	System	+ -	Positive Negative
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_DELIV_STATUS	User	Archived Available Cancelled Denied_BA New Submitted_BA Superceded Expired Denied_TA Budget_Appr Submitted_TA	Archived Available Cancelled Denied - Budget Approval New Submitted - Budget Approval Superceded Expired Denied - Concept Approval Budget Approved Submitted - Concept Approval
AMS_DELIVERY_MEDIA_TYPE	Extensible	I SEMINAR ON_SITE SEMINAR WEB	I Seminar On Site Seminar Web

Table B–1 Oracle Marketing Lookup Values

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

Table B–1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
AMS_DM_TARGET_VALUE_TYPE	System	Binary Categorical Continuous	Binary Categorical Continuous
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 available
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

Table B-1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
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
AMS_EVENT_PAYMENT_STATUS	System	Comp Free Invoiced Paid Refunded	Complimentary Free Invoiced Paid Refunded
AMS_EVENT_PURPOSE			Obsolete for 11.5.8
AMS_EVEH_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

Table B–1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
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			Obsolete for 11.5.8.
AMS_EVEO_OBJECTIVE	User	Organization defined values	Objective for the Event.
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

Table B–1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
AMS_EVENT_STREAM_TYPE	System	A B C D	A B C D
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

Table B-1 Oracle Marketing Lookup Values

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_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_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

Table B-1 Oracle Marketing Lookup Values

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

Table B-1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
AMS_LIST_ GENERATION_ TYPE	System	Incremental Standard Update Update No Purge	New entries added, old entries not deleted, entries not updated All old entries deleted, new entries added New entries added, old entries not meeting criteria deleted, entry information updated 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.
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

Table B-1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
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.
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

Table B–1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
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

Table B–1 Oracle Marketing Lookup Values

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

Table B–1 Oracle Marketing Lookup Values

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 Offer Schedule	Product Web Offer Web Advertisement

Table B–1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
AMS_POST_PREDEF_PROD_CONTEXT	System	Prod_viewed Prod_in_cart	The product context for relationship based strategy.
AMS_POST_RELATIONSHIPS	System	Promoting Relationship types not covered by iStore	Promoting is a relationship not covered by iStore, 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	

Table B–1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
AMS_PROGRAM_STATUS	System	Active Archived Cancelled Completed New On_Hold	Active Archived Cancelled Completed New Active, but locked
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

Table B-1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
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
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

Table B-1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
AMS_YEARS	System	1995	1995
		1996	1996
		1997	1997
		1998	1998
		1999	1999
		2000	2000
		2001	2001
		2002	2002

Table B–1 Oracle Marketing Lookup Values

Key	Type	Values	Meanings
IBE_RELATIONSHIP_TYPES	Extensible	Possible relationships between Products like Cross Sell, Up Sell.	This is an iStore lookup type.
INVENTORY_ITEM_STATUS_CODE	User	ACTIVE INACTIVE	Active Inactive

Table B–1 Oracle Marketing Lookup Values

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

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.

Topics include:

- [Section C.1, "Running Concurrent Programs"](#)
- [Section C.2, "Checking Concurrent Program Status"](#)
- [Section C.3, "Oracle Marketing Request Sets"](#)
- [Section C.4, "Oracle Marketing Concurrent Manager Programs"](#)

C.1 Running Concurrent Programs

Use the following instructions for running any Oracle Applications concurrent program or program set. You can use these procedures to run or schedule any of the Oracle Marketing concurrent programs.

See *Oracle Applications System Administrator's Guide* for complete details on Oracle Applications concurrent programs.

Prerequisites

None

Steps

1. Log in to Oracle Forms with appropriate responsibility. The Submit a New Request Form automatically opens.

For Oracle applications concurrent programs, the responsibility varies by module.

2. Choose Single Request (if running a single concurrent program) or Request Set (if running a set of concurrent programs).
3. Select OK. The Submit Request form opens.
4. Query for the appropriate concurrent program, if necessary.
5. Enter run immediately or select Schedule to schedule batch jobs.
6. If scheduling, select the timeframe:
 - As soon as Possible: Select this option if running the program immediately.
 - Once: Select this option to run the programs(s) one at a time.
 - Periodically or On Specific Days: Select this option to run the program on a schedule that you will later specify.
7. Select Submit to submit the request.

C.2 Checking Concurrent Program Status

Use the following procedure to check the status of a concurrent program.

Prerequisites

None

Steps

1. Log in to Oracle Forms with System Administrator Responsibility.
2. Choose Concurrent > Request.
The Find Request window (defaulted to “All My Requests”) opens.
3. In the Find Request window, search for your concurrent program request.
 - If the server is not busy, then selecting Find may be the fastest way to find your request.
 - If the server is busy, it may be better to enter search criteria and look for Specific Requests.
4. The Request window displays a list of submitted requests. The Oracle Marketing concurrent programs should be listed.
5. Select Refresh Data occasionally to check the completion status.
6. Once in the “red” state or Phase = “completed” the “View Output” and “View Log” buttons will become active (if the log output files have been setup correctly).

C.3 Oracle Marketing 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.

Table C–1 Oracle Marketing Request Sets

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 Marketing Facts for the First Time, Object to Load: Leads BIM: Load Marketing Facts for the First Time, Object to Load: Lead_Import BIM: Load Marketing Facts for the First Time, Object to Load: Response 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 BIM: Initial Build of Interaction History Responses Materialized Views

Table C–1 Oracle Marketing Request Sets

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: Refresh of Interaction History Responses Materialized Views
BIM: Refresh Materialized Views - Lead Intelligence	BIM: Refresh Summary by Group Hierarchy Materialized Views BIM: Refresh of Lead KPI Materialized Views BIM: Refresh of Lead Quality Materialized Views BIM: Refresh of Lead Sources Materialized Views BIM: Refresh of Lead Import Materialized Views BIM: Refresh of Responses 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 Marketing Facts from Previous Refresh Date, Object to Load: Leads BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Lead_Import BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Response BIM: Load Key Performance Indicator Facts from Previous Refresh Date

C.4 Oracle Marketing Concurrent Manager Programs

The table below indicates the Concurrent Manager programs for Oracle Marketing.

Table C-2 Oracle Marketing 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.
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: <code>force_purge_flag</code> . 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.

Table C–2 Oracle Marketing Concurrent Manager Programs

Concurrent Manager	Required	Description
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: Adjust Backdated Offer	Yes	Concurrent program to adjust backdated offers. This should be run after running the AMS-TM: Funds Accrual Engine concurrent program.
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: p_run_exception. Set to Y to run Order Management Except Queue.
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: 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

Table C–2 Oracle Marketing Concurrent Manager Programs

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: 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 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.

Table C-2 Oracle Marketing Concurrent Manager Programs

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 Update Data Mining Models	Optional	Updates detail information collected on parties. The frequency should be the same as the BIC Summary Extraction process.
AMS Web Execution: Specialty Store Items Refresh Program	Yes	This refreshes the denormalized table for minisites periodically to capture items in the iStore minisites.
AMS Web Execution: Campaign Items Refresh Program	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.
AMS 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.
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.

Table C–2 Oracle Marketing Concurrent Manager Programs

Concurrent Manager	Required	Description
BIM: Load Marketing Facts for the First Time	Optional	Loads all Facts for the first time. Repeat for each object: Campaign, Event, Budget, Leads, Lead Import and Response. Parameters: Start Date End Date Part of the Request Set: BIM: Load Marketing Facts for the First Time
BIM: Load Marketing Facts from the Previous Refresh Date	Optional	Loads all Facts from the Previous Refresh Date. Repeat for each object: Campaign, Event, Budget, Leads, Lead Import and Response. Parameters: Start Date End Date Part of the Request Set: BIM: Load Marketing Facts from the Previous Refresh Date
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
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

Table C-2 Oracle Marketing Concurrent Manager Programs

Concurrent Manager	Required	Description
BIM: Initial build of Interaction History Materialized Views	Optional	Prepares pre-built tables for Interaction History 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: Initial build of Leads Quality Materialized Views	Optional	Prepares pre-built tables for Leads Quality Materialized Views Part of the Request Set: BIM: Initial build of Materialized Views - Lead Intelligence
BIM: Initial build of Leads Sources Materialized Views	Optional	Prepares pre-built tables for Leads Sources Materialized Views Part of the Request Set: BIM: Initial build of Materialized Views - Lead Intelligence
BIM: Initial build of Lead Import Materialized Views	Optional	Prepares pre-built tables for Lead Import Materialized Views Part of the Request Set: BIM: Initial build of Materialized Views - Lead Intelligence
BIM: Initial build of Responses Materialized Views	Optional	Prepares pre-built tables for Responses Materialized Views Part of the Request Set: BIM: Initial build of Materialized Views - Lead Intelligence
BIM: Refresh Campaign Materialized Views	Optional	Builds Campaigns Materialized views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh of Materialized Views

Table C-2 Oracle Marketing Concurrent Manager Programs

Concurrent Manager	Required	Description
BIM: Refresh Events Materialized Views	Optional	Builds Events Materialized views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh of 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 of Materialized Views
BIM: Refresh of Interaction History Materialized Views	Optional	Builds Interaction History Materialized views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh of 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 of 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 of Materialized Views
BIM: Refresh of Summary by Group Hierarchy	Optional	Builds summarized tables based on group hierarchy. Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence
BIM: Refresh of Leads KPI Materialized Views	Optional	Builds Leads KPI Materialized Views. Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence

Table C-2 Oracle Marketing Concurrent Manager Programs

Concurrent Manager	Required	Description
BIM: Refresh of Leads Quality Materialized Views	Optional	Builds Leads Quality Materialized Views. Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence
BIM: Refresh of Leads Sources Materialized Views	Optional	Builds Leads Sources Materialized Views. Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence
BIM: Refresh of Lead Import Materialized Views	Optional	Builds Lead Import Materialized Views. Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence
BIM: Refresh of Responses Materialized Views	Optional	Builds Responses Materialized Views. Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence
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.

Table C-2 Oracle Marketing Concurrent Manager Programs

Concurrent Manager	Required	Description
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
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.

Table C–2 Oracle Marketing Concurrent Manager Programs

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.
Workflow Background Process	Yes	Starts the Workflow engine.
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.

List Import Fields

This appendix provides tables of all of the List Import table fields used by Oracle Marketing. Please see the chapter on Implement List Import for more information on these tables.

Topics include:

- [Section D.1, "B2B List Import Fields"](#)
- [Section D.2, "B2C List Import Fields"](#)
- [Section D.3, "Event List Import Fields"](#)
- [Section D.4, "Lead List Import Fields"](#)

D.1 B2B 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.

Table D–1 B2B List Import Fields

Field in Import File	Data Type	Table Name	Import Requires Entry	Column Name
ADDRESS LINES PHONETIC	VARCHAR2(150)	HZ_LOCATIONS	No	ADDRESS LINES PHONETIC
ADDRESS1	VARCHAR2(150)	HZ_LOCATIONS	No	ADDRESS1
ADDRESS2	VARCHAR2(150)	HZ_LOCATIONS	No	ADDRESS2
ADDRESS3	VARCHAR2(150)	HZ_LOCATIONS	No	ADDRESS3
ADDRESS4	VARCHAR2(150)	HZ_LOCATIONS	No	ADDRESS4
ANALYSIS_FY	VARCHAR2	HZ_ORGANIZATION_PROFILES	No	ANALYSIS_FY
CATEGORY CODE	VARCHAR2	HZ_PARTIES	No	CATEGORY CODE
CEO NAME	VARCHAR2(50)	HZ_ORGANIZATION_PROFILES	No	CEO NAME
CITY	VARCHAR2(60)	HZ_LOCATIONS	No	CITY
COUNTRY	VARCHAR2(60)	HZ_LOCATIONS	No	COUNTRY
COUNTY	VARCHAR2(60)	HZ_LOCATIONS	No	
‘COUNTRY’				
CREATED BY	NUMBER	HZ_PARTIES	No	CREATED BY
CREATION DATE	DATE	HZ_PARTIES	No	CREATION DATE
CURR FY POTENTIAL REVENUE	NUMBER	HZ_ORGANIZATION_PROFILES	No	CURR FY POTENTIAL REVENUE
DECISION MAKER FLAG	VARCHAR2(1)	HZ_ORG_CONTACTS	No	DECISION MAKER FLAG
DEDUPE KEY	VARCHAR2(150)	HZ_PARTIES	No	DEDUPE KEY

Table D-1 B2B List Import Fields

DEPARTMENT	VARCHAR2(60)	HZ_ORG_CONTACTS	No	DEPARTMENT
DUNS NUMBER	NUMBER	HZ_ORGANIZATION_PROFILES	No	DUNS NUMBER
EMAIL ADDRESS	VARCHAR2(150)	HZ_CONTACT_POINTS	No	EMAIL ADDRESS
EMPLOYEES TOTAL	NUMBER	HZ_ORGANIZATION_PROFILES	No	EMPLOYEES TOTAL
FISCAL YEAREND MONTH	VARCHAR2(30)	HZ_PARTIES	No	FISCAL YEAREND MONTH
FLOOR	VARCHAR2	HZ_LOCATIONS	No	FLOOR
GSA INDICATOR FLAG	VARCHAR2	HZ_PARTIES	No	GSA INDICATOR FLAG
HOUSE NUMBER	VARCHAR2	HZ_LOCATIONS	No	HOUSE NUMBER
IMPORT LIST HEADER ID	NUMBER	AMS_IMP_SOURCE_LINES	No	IMPORT LIST HEADER ID
IMPORT SOURCE LINE ID	NUMBER	AMS_IMP_SOURCE_LINES	No	IMPORT SOURCE LINE ID
JGZZ FISCAL CODE	VARCHAR2	HZ_PARTIES	No	JGZZ FISCAL CODE
JOB TITLE	VARCHAR2(60)	HZ_ORG_CONTACTS	No	JOB TITLE
LAST UPDATE DATE	DATE	AMS_IMP_SOURCE_LINES	No	LAST UPDATE DATE
LAST UPDATE LOGIN	NUMBER	AMS_IMP_SOURCE_LINES	No	LAST UPDATE LOGIN
LAST UPDATED BY	NUMBER	AMS_IMP_SOURCE_LINES	No	LAST UPDATED BY
LEGAL STATUS	VARCHAR2(30)	HZ_PARTIES	No	LEGAL STATUS
LINE OF BUSINESS	VARCHAR2(30)	HZ_PARTIES	No	LINE OF BUSINESS
MISSING STATEMENT	VARCHAR2	HZ_PARTIES	No	MISSING STATEMENT
NEXT FY POTENTIAL REVENUE	NUMBER	HZ_PARTIES	No	NEXT FY POTENTIAL REVENUE

Table D–1 B2B List Import Fields

NOTES	VARCHAR2(4000)	AMS_IMP_SOURCE_LINES	No	NOTES
ORGANIZATION NAME PHONETIC	VARCHAR2	HZ_PARTIES	No	ORGANIZATION NAME PHONETIC
PARTY NAME	VARCHAR2(150)	HZ_PARTIES	Yes	PARTY NAME
PERSON FIRST NAME	VARCHAR2(150)	HZ_PARTIES	No	PERSON FIRST NAME
PERSON LAST NAME	VARCHAR2(150)	HZ_PARTIES	No	PERSON LAST NAME
PERSON MIDDLE NAME	VARCHAR2(60)	HZ_PARTIES	No	PERSON MIDDLE NAME
PERSON NAME SUFFIX	VARCHAR2(30)	HZ_PARTIES	No	PERSON NAME SUFFIX
PERSON TITLE	VARCHAR2(60)	HZ_PARTIES	No	PERSON TITLE
PHONE AREA CODE	VARCHAR2(10)	HZ_CONTACT_POINTS	No	PHONE AREA CODE
PHONE COUNTRY CODE	VARCHAR2(10)	HZ_CONTACT_POINTS	No	PHONE COUNTRY CODE
PHONE EXTENTION	VARCHAR2(20)	HZ_CONTACT_POINTS	No	PHONE EXTENTION
PHONE NUMBER	VARCHAR2(40)	HZ_CONTACT_POINTS	No	PHONE NUMBER
PO BOX NUMBER		HZ_LOCATIONS	No	PO BOX NUMBER
POSTAL CODE	VARCHAR2(60)	HZ_LOCATIONS	No	POSTAL CODE
POSTAL PLUS4 CODE		HZ_LOCATIONS	No	POSTAL PLUS4 CODE
PROVINCE	VARCHAR2(60)	HZ_LOCATIONS	No	PROVINCE
PROVINCE				
SALES AGENT LOGIN ID	VARCHAR2(2000)	AMS_IMP_SOURCE_LINES	No	SALES AGENT LOGIN ID
SIC CODE	VARCHAR2	HZ_ORGANIZATION_PROFILES	No	SIC CODE
SIC CODE TYPE	VARCHAR2	HZ_ORGANIZATION_PROFILES	No	SIC CODE TYPE

Table D–1 B2B List Import Fields

SITE USE TYPE	VARCHAR2	HZ_ORGANIZATION_PROFILES	No	SITE USE TYPE
STATE	VARCHAR2(60)	HZ_LOCATIONS	No	STATE
STATE				
STREET	VARCHAR2	HZ_LOCATIONS	No	STREET
STREET NUMBER	VARCHAR2	HZ_LOCATIONS	No	STREET NUMBER
STREET SUFFIX	VARCHAR2	HZ_LOCATIONS	No	STREET SUFFIX
SUITE	VARCHAR2	HZ_LOCATIONS	No	SUITE
TAX REFERENCE	VARCHAR2(50)	HZ_PARTIES	No	TAX REFERENCE
VEHICLE REPOSE CODE	VARCHAR2(30)	AMS_IMP_SOURCE_LINES	No	VEHICLE REPOSE CODE
YEAR ESTABLISHED	NUMBER(4)	HZ_PARTIES	No	YEAR ESTABLISHED
ADDRESS EFFECTIVE DATE	DATE	HZ_LOCATIONS		ADDRESS EFFECTIVE DATE
ADDRESS EXPIRATION DATE	DATE	HZ_LOCATIONS		ADDRESS EXPIRATION DATE
BRANCH FLAG	VARCHAR	HZ_ORGANIZATION_PROFILES		BRANCH FLAG
BUSINESS LINE	VARCHAR	HZ_ORGANIZATION_PROFILES		BUSINESS LINE
BUSINESS SCOPE	VARCHAR	HZ_ORGANIZATION_PROFILES		BUSINESS SCOPE
CHIEF EXECUTIVE TITLE	VARCHAR	HZ_ORGANIZATION_PROFILES		CHIEF EXECUTIVE TITLE
CONGRESSIONAL DISTRICT CODE	VARCHAR	HZ_ORGANIZATION_PROFILES		CONGRESSIONAL DISTRICT CODE
CONTROL YEAR	NUMBER	HZ_ORGANIZATION_PROFILES		CONTROL YEAR

Table D-1 B2B List Import Fields

CORPORATION CLASS	VARCHAR	HZ_ORGANIZATION_PROFILES		CORPORATION CLASS
CREDIT SCORE	VARCHAR	HZ_ORGANIZATION_PROFILES		CREDIT SCORE
CREDIT SCORE COMMENTARY	VARCHAR	HZ_ORGANIZATION_PROFILES		CREDIT SCORE COMMENTARY
DB RATING	VARCHAR	HZ_ORGANIZATION_PROFILES		DB RATING
DATE OF BIRTH	DATE	HZ_PERSON_PROFILES		DATE OF BIRTH
DATE OF DEATH	DATE	HZ_PERSON_PROFILES		DATE OF DEATH
DEBARMENTS COUNT	NUMBER	HZ_ORGANIZATION_PROFILES		DEBARMENTS COUNT
DEBARTMENTS DATE	DATE	HZ_ORGANIZATION_PROFILES		DEBARTMENTS DATE
DECLARED ETHNICITY	VARCHAR	HZ_PERSON_PROFILES		DECLARED ETHNICITY
DEBARTMENT INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES		DEBARTMENT INDICATOR
DESCRIPTION	VARCHAR	HZ_LOCATIONS		DESCRIPTION
DISADVANTAGED INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES		DISADVANTAGED INDICATOR
ENQUIRY DUNS	VARCHAR	HZ_ORGANIZATION_PROFILES		ENQUIRY DUNS
EXPORT INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES		EXPORT INDICATOR

Table D-1 B2B List Import Fields

FAILURE SCORE	VARCHAR	HZ_ORGANIZATION_PROFILES		FAILURE SCORE
FAILURE SCORE COMMENTARY	VARCHAR	HZ_ORGANIZATION_PROFILES		FAILURE SCORE COMMENTARY
FAILURE SCORE NATL PERCENTILE	VARCHAR	HZ_ORGANIZATION_PROFILES		FAILURE SCORE NATL PERCENTILE
FAILURE SCORE OVERRIDE CODE	VARCHAR	HZ_ORGANIZATION_PROFILES		FAILURE SCORE OVERRIDE CODE
FISCAL CODE	VARCHAR	HZ_PARTIES		FISCAL CODE
GLOBAL FAILURE SCORE	VARCHAR	HZ_ORGANIZATION_PROFILES		GLOBAL FAILURE SCORE
HEADQUARTER BRANCH INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES		HEADQUARTER BRANCH INDICATOR
HEAD OF HOUSEHOLD FLAG	VARCHAR	HZ_PERSON_PROFILES		HEAD OF HOUSEHOLD FLAG
HOUSEHOLD SIZE	VARCHAR	HZ_PERSON_PROFILES		HOUSEHOLD SIZE
IMPORT INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES		IMPORT INDICATOR
ORGANIZATION KNOWN AS	VARCHAR	HZ_PARTIES		ORGANIZATION KNOWN AS
ORGANIZATION KNOWN AS2	VARCHAR	HZ_PARTIES		ORGANIZATION KNOWN AS2
ORGANIZATION KNOWN AS3	VARCHAR	HZ_PARTIES		ORGANIZATION KNOWN AS3
ORGANIZATION KNOWN AS4	VARCHAR	HZ_PARTIES		ORGANIZATION KNOWN AS4
ORGANIZATION KNOWN AS5	VARCHAR	HZ_PARTIES		ORGANIZATION KNOWN AS5
PERSON KNOWN AS	VARCHAR	HZ_PARTIES		PERSON KNOWN AS

Table D–1 B2B List Import Fields

PERSON KNOWN AS2	VARCHAR	HZ_PARTIES		PERSON KNOWN AS2
PERSON KNOWN AS3	VARCHAR	HZ_PARTIES		PERSON KNOWN AS3
PERSON KNOWN AS4	VARCHAR	HZ_PARTIES		PERSON KNOWN AS4
PERSON KNOWN AS5	VARCHAR	HZ_PARTIES		PERSON KNOWN AS5
LABOR SURPLUS INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES		LABOR SURPLUS INDICATOR
LOCAL ACTIVITY CODE	VARCHAR	HZ_ORGANIZATION_PROFILES		LOCAL ACTIVITY CODE
LOCAL ACTIVITY CODE TYPE	VARCHAR	HZ_ORGANIZATION_PROFILES		LOCAL ACTIVITY CODE TYPE
LOCATION DIRECTIONS	VARCHAR	HZ_LOCATIONS		LOCATION DIRECTIONS
LOCATION STATUS	VARCHAR	HZ_LOCATIONS		LOCATION STATUS
MARITAL STATUS	VARCHAR	HZ_PERSON_PROFILES		MARITAL STATUS
MARITAL STATUS EFFECTIVE DATE	DATE	HZ_PERSON_PROFILES		MARITAL STATUS EFFECTIVE DATE
MINORITY OWNED INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES		MINORITY OWNED INDICATOR
MINORITY OWNED TYPE	VARCHAR	HZ_ORGANIZATION_PROFILES		MINORITY OWNED TYPE
ORGANIZATION ALIAS	VARCHAR	HZ_PARTIES		ORGANIZATION ALIAS
ORGANIZATION TYPE	VARCHAR	HZ_PARTIES		ORGANIZATION TYPE
ORGANIZATION URL	VARCHAR	HZ_PARTIES		ORGANIZATION URL
OUT OF BUSINESS INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES		OUT OF BUSINESS INDICATOR
PERSONAL INCOME	NUMBER	HZ_PERSON_PROFILES		PERSONAL INCOME

Table D-1 B2B List Import Fields

PERSON ACADEMIC TITLE	VARCHAR	HZ_PERSON_PROFILES		PERSON ACADEMIC TITLE
PERSON FIRST NAME PHONETIC	VARCHAR	HZ_PARTIES		PERSON FIRST NAME PHONETIC
PERSON LAST NAME PHONETIC	VARCHAR	HZ_PARTIES		PERSON LAST NAME PHONETIC
MIDDLE NAME PHONETIC	VARCHAR	HZ_PARTIES		MIDDLE NAME PHONETIC
PERSON NAME PHONETIC	VARCHAR	HZ_PARTIES		PERSON NAME PHONETIC
PERSON PREVIOUS TITLE NAME	VARCHAR	HZ_PARTIES		PERSON PREVIOUS TITLE NAME
PLACE OF BIRTH	VARCHAR	HZ_PERSON_PROFILES		PLACE OF BIRTH
PRINCIPAL NAME	VARCHAR	HZ_ORGANIZATION_PROFILES		PRINCIPAL NAME
PRINCIPAL TITLE	VARCHAR	HZ_ORGANIZATION_PROFILES		PRINCIPAL TITLE
PUBLIC PRIVATE OWNERSHIP FLAG	VARCHAR	HZ_ORGANIZATION_PROFILES		OWNERSHIP FLAG
RENT OWNED INDICATOR	VARCHAR	HZ_PERSON_PROFILES		RENT OWNED INDICATOR
SECOND TITLE	VARCHAR	HZ_PERSON_PROFILES		PERSON ACADEMIC TITLE
SHORT DESCRIPTION	VARCHAR	HZ_LOCATIONS		SHORT DESCRIPTION
SMALL BUSINESS INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES		SMALL BUSINESS INDICATOR
TAX ID	VARCHAR	HZ_PERSON_PROFILES		TAX REFERENCE
WOMAN OWNED INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES		WOMAN OWNED INDICATOR

Table D-1 B2B List Import Fields

ORGANIZATION ATTRIBUTE1	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE1
ORGANIZATION ATTRIBUTE2	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE2
ORGANIZATION ATTRIBUTE3	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE3
ORGANIZATION ATTRIBUTE4	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE4
ORGANIZATION ATTRIBUTE5	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE5
ORGANIZATION ATTRIBUTE6	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE6
ORGANIZATION ATTRIBUTE7	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE7
ORGANIZATION ATTRIBUTE8	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE8
ORGANIZATION ATTRIBUTE9	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE9
ORGANIZATION ATTRIBUTE10	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE10
ORGANIZATION ATTRIBUTE11	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE11
ORGANIZATION ATTRIBUTE12	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE12
ORGANIZATION ATTRIBUTE13	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE13

Table D–1 B2B List Import Fields

ORGANIZATION ATTRIBUTE14	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE14
ORGANIZATION ATTRIBUTE15	VARCHAR	HZ_ ORGANIZATION _PROFILES		ATTRIBUTE15
ORG CONTACT ATTRIBUTE1	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE1
ORG CONTACT ATTRIBUTE2	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE2
ORG CONTACT ATTRIBUTE3	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE3
ORG CONTACT ATTRIBUTE4	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE4
ORG CONTACT ATTRIBUTE5	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE5
ORG CONTACT ATTRIBUTE6	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE6
ORG CONTACT ATTRIBUTE7	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE7
ORG CONTACT ATTRIBUTE8	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE8
ORG CONTACT ATTRIBUTE9	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE9
ORG CONTACT ATTRIBUTE10	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE10
ORG CONTACT ATTRIBUTE11	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE11
ORG CONTACT ATTRIBUTE12	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE12
ORG CONTACT ATTRIBUTE13	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE13
ORG CONTACT ATTRIBUTE14	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE14
ORG CONTACT ATTRIBUTE15	VARCHAR	HZ_ORG_ CONTACTS		ATTRIBUTE15

Table D–1 B2B List Import Fields

ADDRESS ATTRIBUTE1	VARCHAR	HZ_LOCATIONS		ATTRIBUTE1
ADDRESS ATTRIBUTE2	VARCHAR	HZ_LOCATIONS		ATTRIBUTE2
ADDRESS ATTRIBUTE3	VARCHAR	HZ_LOCATIONS		ATTRIBUTE3
ADDRESS ATTRIBUTE4	VARCHAR	HZ_LOCATIONS		ATTRIBUTE4
ADDRESS ATTRIBUTE5	VARCHAR	HZ_LOCATIONS		ATTRIBUTE5
ADDRESS ATTRIBUTE6	VARCHAR	HZ_LOCATIONS		ATTRIBUTE6
ADDRESS ATTRIBUTE7	VARCHAR	HZ_LOCATIONS		ATTRIBUTE7
ADDRESS ATTRIBUTE8	VARCHAR	HZ_LOCATIONS		ATTRIBUTE8
ADDRESS ATTRIBUTE9	VARCHAR	HZ_LOCATIONS		ATTRIBUTE9
ADDRESS ATTRIBUTE10	VARCHAR	HZ_LOCATIONS		ATTRIBUTE10
ADDRESS ATTRIBUTE11	VARCHAR	HZ_LOCATIONS		ATTRIBUTE11
ADDRESS ATTRIBUTE12	VARCHAR	HZ_LOCATIONS		ATTRIBUTE12
ADDRESS ATTRIBUTE13	VARCHAR	HZ_LOCATIONS		ATTRIBUTE13
ADDRESS ATTRIBUTE14	VARCHAR	HZ_LOCATIONS		ATTRIBUTE14
ADDRESS ATTRIBUTE15	VARCHAR	HZ_LOCATIONS		ATTRIBUTE15
FAX COUNTRY CODE	VARCHAR	HZ_CONTACT_POINTS		FAX COUNTRY CODE
FAX AREA CODE	VARCHAR	HZ_CONTACT_POINTS		FAX AREA CODE
FAX NUMBER	VARCHAR	HZ_CONTACT_POINTS		FAX NUMBER
ORG ATTRIBUTE CATEGORY	VARCHAR	HZ_ORGANIZATION_PROFILES		ORG ATTRIBUTE CATEGORY
ORG CONTACT ATTRIBUTE CATEGORY	VARCHAR	HZ_ORG_CONTACTS		ORG CONTACT ATTRIBUTE CATEGORY

Table D–1 B2B List Import Fields

ADDRESS ATTRIBUTE CATEGORY	VARCHAR	HZ_LOCATIONS		ADDRESS ATTRIBUTE CATEGORY
PARTY SITE USE	VARCHAR	HZ_PARTY_SITE_USES		PARTY SITE USE
ORIGINAL SYSTEM REFERENCE	VARCHAR	HZ_PARTIES		ORIG SYSTEM REFERENCE

D.2 B2C List Import Fields

The following table indicates B2C List Import Fields.

Table D–2 B2C List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ADDRESS_LINES_PHONETIC	VARCHAR2	No	No		
ADDRESS1	VARCHAR2(150)	No	No		Required every time if address is required.
ADDRESS2	VARCHAR2(150)	No	No		
ADDRESS3	VARCHAR2	No	No		
ADDRESS4	VARCHAR2	No	No		
CITY	VARCHAR2(60)	No	No	Select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'CITY'	

Table D–2 B2C List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
COUNTRY	VARCHAR2(60)	No	No	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)	No	No	Select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'COUNTRY'	
CREATED_BY	NUMBER	Yes	No		Populated by the list import program.
CREATION_DATE	DATE	Yes	No		Populated by the list import program.
DEDUPE_KEY	VARCHAR2(150)	No	No		Populated by the list import program.
EMAIL_ADDRESS	VARCHAR2(150)	No	No		
FLOOR		No	No		
GENDER	VARCHAR2(30)	No	No		
HOUSE_NUMBER		No	No		
HOUSEHOLD_INCOME	NUMBER	No	No		
IMPORT_LIST_HEADER_ID	NUMBER	Yes	No		Auto Generated
IMPORT_SOURCE_LINE_ID	NUMBER	Yes	No		Auto Generated
IMPORT_SUCCESSFUL_FLAG	VARCHAR2(1)	No	No		

Table D–2 B2C List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
LAST_UPDATE_DATE	DATE	Yes	No		Populated by the list import program.
LAST_UPDATE_LOGIN	NUMBER	Yes	No		Populated by the list import program.
LAST_UPDATED_BY	NUMBER	Yes	No		Populated by the list import program.
NOTES	VARCHAR2(4000)	No	No		
OBJECT_VERSION_NUMBER	NUMBER	Yes	No		Populated by the list import program.
PERSON_FIRST_NAME	VARCHAR2(150)	No	Yes		This is a required column in the data file for B2C type of data
PERSON_LAST_NAME	VARCHAR2(150)	No	Yes		This is a required column in the data file for B2C type of data
PERSON_MIDDLE_NAME	VARCHAR2(60)	No	No		
PERSON_NAME_SUFFIX	VARCHAR2(30)	No	No		
PERSON_PRE_NAME_ADJUNCT		No	No		
PERSON_TITLE	VARCHAR2(60)	No	No		
PHONE_AREA_CODE	VARCHAR2(10)	No	No		
PHONE_COUNTRY_CODE	VARCHAR2(10)	No	No		
PHONE_EXTENTION	VARCHAR2(20)	No	No		

Table D–2 B2C List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PHONE_NUMBER	VARCHAR2(40)	No	No		Required if any of the phone information is provided.
PO_BOX_NUMBER	VARCHAR2	No	No		
POSTAL_CODE	VARCHAR2(60)	No	No	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		No	No		
PROVINCE	VARCHAR2(60)	No	No	Select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'PROVINCE'	
SALES_AGENT_LOGIN_ID	VARCHAR2(2000)	No	No		
SALUTATION	VARCHAR2	No	No		
SITE_USE_TYPE	VARCHAR2	No	No		

Table D–2 B2C List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
STATE	VARCHAR2(60)	No	No	Select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'STATE'	
STREET	VARCHAR2	No	No		
STREET_NUMBER	VARCHAR2	No	No		
STREET_SUFFIX	VARCHAR2	No	No		
SUITE	VARCHAR2	No	No		
VEHICLE_RESPONSE_CODE	VARCHAR2(30)	No	No		Based on lookup AMS_Vehicle_Response_Code

D.3 Event List Import Fields

Following table shows the mapping for Event registration import. Note that only Event Source code is a required field. But many other fields are conditionally required.

1. If the Party ID and Contact ID are provided in the csv file, the import will not create party but will use the ids provided in the csv and register them.
2. If the Party ID and Contact ID are not provided, then registrant first name, last name and email address are required as the import program will use those fields to create the party and register them. If the Attendant first name, last name and email address are not provided in the csv file, the import program will use the details from the registrant fields for attendant information.

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
EVENT_SOURCE_CODE/ Event Source Code Table Entry Required: Yes Import Entry Required: Yes	VARCHAR2(100)		Source code for Event - how the Event being registered for is identified.	ams_Event_registrations	SOURCE_CODE
REGISTRATION_SOURCE_TYPE/ Registration Source Type	VARCHAR2(30)	Lookup AMS_EVENT_REG_SOURCE	How the party registered for the Event (web, phone, etc.).	ams_Event_registrations	REG_SOURCE_TYPE_CODE
ATTENDANCE_FLAG/ Attendance Flag	VARCHAR2(1)	Y/N	Whether or not the party has attended the Event.	ams_Event_registrations	ATTENDED_FLAG
WAITLISTED_FLAG/ Waitlisted Flag	VARCHAR2(1)	Y/N	Whether or not to force the system to waitlist the party or not waitlist the party. If null, the system will waitlist if registrations are full.	ams_Event_registrations	SYSTEM_STATUS_CODE (If the waitlisted_flag is "Y" then registration status will be Waitlisted).
CANCELLATION_FLAG/ Cancellation Flag	VARCHAR2(1)	Y/N	Whether or not to cancel the party's registration.	ams_Event_registrations	SYSTEM_STATUS_CODE (If the cancellation flag is "Y" then registration status will be cancelled).
CANCELLATION_REASON_CODE/ Cancellation Reason	VARCHAR2(30)	Lookup AMS_EVNT_REG_CANCEL_REASON	The reason for cancellation.	ams_Event_registrations	CANCELLATION_REASON_CODE

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
CONFIRMATION_CODE/ Confirmation Code	VARCHAR2(30)		This code will uniquely identify any registration.	ams_Event_registrations	CONFIRMATION_CODE
ORIGINAL_SYSTEM_REFERENCE/ Original System Reference	VARCHAR2(240)		The original system reference of the registration	hz_parties	ORG_SYSTEM_REFERENCE
REG_PARTY_ID/ Registrant Party ID Table Entry Required: Yes	NUMBER		The party id corresponding to the registrant (B2C) or the registrant's company (B2B).	hz_parties	PARTY_ID
REG_PARTY_TYPE/ Registrant Party Type	VARCHAR2(30)	Fnd_Lookups_Party_Type	The Party Type of the registrant's company	hz_parties	PARTY_TYPE
REG_CONTACT_ID/ Registrant Contact ID Table Entry Required: Yes	NUMBER		The party ID corresponding to the registrant	hz_parties	PARTY_ID
REG_PARTY_NAME/ Registrant Party Name	VARCHAR2(360)		The name of the registrant's company (forces B2B).	hz_parties	PARTY_NAME
REG_TITLE/ Registrant Title	VARCHAR2(30)		Title (Mr. Ms.) of the registrant	hz_org_contacts	TITLE
REG_FIRST_NAME/ Registrant First Name Table Entry Required: Yes	VARCHAR2(150)		First Name of registrant	hz_parties	PERSON_FIRST_NAME
REG_MIDDLE_NAME/ Registrant Middle Name	VARCHAR2(60)		Middle name of registrant	hz_parties	PERSON_MIDDLE_NAME

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_LAST_NAME/ Registrant Last Name Table Entry Required: Yes	VARCHAR2 (150)		Last Name of registrant	hz_parties	PERSON_LAST_NAME
REG_ADDRESS1/ Registrant Address1	VARCHAR2 (240)F		Address (first line) of the registrant	hz_parties	ADDRESS1
REG_ADDRESS2/ Registrant Address1	VARCHAR2 (240)F		Address (second line) of the registrant	hz_parties	ADDRESS2
REG_ADDRESS3/ Registrant Address1	VARCHAR2 (240)F		Address (third line) of the registrant	hz_parties	ADDRESS3
REG_ADDRESS4/ Registrant Address1	VARCHAR2 (240)F		Address (fourth line) of the registrant	hz_parties	ADDRESS4
REG_GENDER/ Registrant Gender	VARCHAR2(30)		Gender of the registrant	hz_person_profiles	GENDER
REG_ADDRESS_LINE_PHONETIC/ Registrant Address Line Phonetic	VARCHAR2 (360)		Phonetic address of the registrant	hz_locations	ADDRESS_LINES_PHONETIC
REG_ANALYSIS_FY/ Registrant Analysis FY	VARCHAR2(5)		FY analysis for the registrant	hz_parties	ANALYSIS_FY
REG_APT_FLAG/ Registrant Apt Flag	VARCHAR2(1)	Y/N	Whether or not the registrant's address is an apartment	hz_locations	APARTMENT_FLAG
REG_BEST_TIME_CONTACT_BEGIN/ Registrant Best Time Contact Begin	DATE		Best time to begin contacting the registrant	hz_person_profiles	BEST_TIME_CONTACT_BEGIN
REG_BEST_TIME_CONTACT_END Registrant Best Time Contact End	DATE		Best time to stop contacting the registrant	hz_person_profiles	BEST_TIME_CONTACT_END

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_CATEGORY_CODE/ Registrant Category Code	VARCHAR2(30)		Category code of the registrant	hz_parties	CATEGORY_CODE
REG_CEO_NAME/ Registrant CEO Name	VARCHAR2(360)		CEO of the registrant's company	hz_organizational_profiles	CEO_NAME
REG_CITY/ Registrant City	VARCHAR2(60)		City of the Registrant's Address	hz_parties	CITY
REG_CONTACT_ME_FLAG/ Registrant Contact Me Flag	VARCHAR2(1)	Y/N	Whether or not it is OK to contact the registrant (Do or Do Not Contact)	hz_contact_preferences	PREFERENCE_CODE (if Contact Type is ALL)
REG_COUNTRY/ Registrant Country	VARCHAR2(60)		Country of the registrant's address	hz_parties	COUNTRY
REG_COUNTY/ Registrant County	VARCHAR2(60)		County of the registrant's address	hz_parties	COUNTY
REG_CURRENT_FY_POTENTIAL_REV/ Registrant Current FY Potential Revenue	NUMBER		Current fiscal year potential revenue of the registrant's company	hz_parties	CURR_FY_POTENTIAL_REVENUE
REG_NEXT_FY_POTENTIAL_REV/ Registrant Next FY Potential Revenue	NUMBER		Next fiscal year potential revenue of the registrant's company	hz_parties	NEXT_FY_POTENTIAL_REVENUE
REG_HOUSEHOLD_INCOME/ Registrant Household Income	NUMBER		Household income of the registrant	hz_person_profiles	HOUSEHOLD_INCOME
REG_DECISION_MAKER_FLAG/ Registrant Decision Maker Flag	VARCHAR2(1)	Y/N	Whether or not the registrant is a decision maker	hz_org_contacts	DECISION_MAKER_FLAG

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_ DEPARTMENT/ Registrant Department	VARCHAR2 (360)		The registrant's company department	hz_org_ contacts	DEPARTMENT
REG_DUN_NO_C/ Registrant Dun No.	VARCHAR2(30)		The Duns Number of the registrant's company	hz_parties	DUNS_NUMBER
REG_EMAIL_ ADDRESS/ Registrant email address Table Entry Required: Yes	VARCHAR2 (2000)		Email address of the registrant	hz_parties	EMAIL_ADDRESS
REG_EMAIL_OK_ FLAG/ Registrant Email OK Flag	VARCHAR2(1)	Y/N	Whether or not it is OK to email the registrant	hz_ contact_ preferences	PREFERENCE_ CODE (if Contact_ Type is EMAIL)
REG_EMPLOYEE_ TOTAL/ Registrant Employee Total	NUMBER		Employee total of the registrant's company	hz_parties	EMPLOYEES_ TOTAL
REG_FY_END_ MONTH/ Registrant FY End Month	VARCHAR2(30)		The month in which the registrant's company's fiscal year ends	hz_parties	FISCAL_ YEAREND_ MONTH
REG_FLOOR/ Registrant's Floor	VARCHAR2(50)		The floor (address) of the registrant	hz_ locations	FLOOR
REG_GSA_ INDICATOR_FLAG/ Registrant GSA Indicator Flag	VARCHAR2(30)		The GSA Indicator Flag of the registrant's company	hz_parties	GSA_ INDICATOR_ FLAG
REG_HOUSE_ NUMBER/ Registrant House Number	NUMBER		The house number of the registrant's address	hz_ locations	HOUSE_ NUMBER
REG_IDENTIFYING_ ADDRESS_FLAG/ Registrant Identifying Address Flag	VARCHAR2(1)	Y/N	Whether or not this is the registrant's primary address	hz_party_ sites	IDENTIFYING_ ADDRESS_FLAG

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_JGZZ_FISCAL_CODE/ Registrant JGZZ FISCAL Code	VARCHAR2(20)		The JGZZ Fiscal Code of the registrant's company	hz_parties	JGZZ_FISCAL_CODE
REG_JOB_TITLE/ Registrant Job Title	VARCHAR2(100)		The job title of the registrant	hz_org_contacts	JOB_TITLE
REG_LAST_ORDER_DATE/ Registrant Last Order Date	DATE		Deprecated	hz_parties	LAST_ORDERED_DATE
REG_ORG_LEGAL_STATUS/ Registrant Org Legal Status	VARCHAR2(30)		The legal status of the registrant's company	hz_organizational_profiles	LEGAL_STATUS
REG_LINE_OF_BUSINESS/ Registrant Line of Business	VARCHAR2(240)		The line of business with which the registrant is associated	hz_organizational_profiles	LINE_OF_BUSINESS
REG_MISSION_STATEMENT/ Registrant Mission Statement	VARCHAR2(2000)		The mission statement for the registrant's company	hz_parties	MISSION_STATEMENT
REG_ORG_NAME_PHONETIC/ Registrant Org Name Phonetic	VARCHAR2(320)		The phonetic name of the registrant's company	hz_parties	ORGANIZATION_NAME_PHONETIC
REG_OVERSEAS_ADDRESS_FLAG/ Registrant Overseas Address Flag	VARCHAR2(1)	Y/N	Whether or not the address is overseas	hz_locations	OVERSEAS_ADDRESS_FLAG
REG_NAME_SUFFIX/ Registrant Name Suffix	VARCHAR2(30)		The suffix of the registrant (Jr., M.D., etc.)	hz_parties	PERSON_NAME_SUFFIX
REG_PHONE_AREA_CODE/ Registrant Phone Area Code	VARCHAR2(10)		The area code of the registrant's phone number	hz_contact_points	PHONE_AREA_CODE

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_PHONE_COUNTRY_CODE/ Registrant Phone Country Code	VARCHAR2(10)		The country code of the registrant's phone number	hz_contact_points	PHONE_COUNTRY_CODE
REG_PHONE_EXTENSION/ Registrant Phone Extension	VARCHAR2(20)		The extension of the registrant's phone number	hz_contact_points	PHONE_EXTENSION
REG_PHONE_NUMBER/ Registrant Phone Number	VARCHAR2(40)		The registrant's phone number	hz_contact_points	PHONE_NUMBER
REG_POSTAL_CODE/ Registrant Postal Code	VARCHAR2(60)		The postal code of the registrant's address	hz_parties	POSTAL_CODE
REG_POSTAL_PLUS4_CODE/ Registrant Postal plus4 Code	VARCHAR2(4)		The postal plus-four code of the registrant's address	hz_locations	POSTAL_PLUS4_CODE
REG_PO_BOX_NO/ Registrant PO Box No	VARCHAR2(50)		The PO Box number of the registrant's address	hz_locations	PO_BOX_NUMBER
REG_PROVINCE/ Registrant Province	VARCHAR2(60)		The province of the registrant's address	hz_locations, hz_parties	PROVINCE
REG_RURAL_ROUTE_NO/ Registrant Rural Route No	VARCHAR2(50)		The rural route number of the registrant's address	hz_locations	RURAL_ROUTE_NUMBER
REG_RURAL_ROUTE_TYPE/ Registrant Rural Route Type	VARCHAR2(30)		The rural route type of the registrant's address	hz_locations	RURTAL_ROUTE_TYPE
REG_SECONDARY_SUFFIX_ELEMENT/ Registrant Secondary Suffix Element	VARCHAR2(30)		The secondary suffix (such as Jr. or M.D.) of the registrant	hz_locations	SECONDARY_SUFFIX_ELEMENT

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_SIC_CODE/ Registrant SIC Code	VARCHAR2(30))		The SIC Code of the registrant's company	hz_parties	SIC_CODE
REG_SIC_CODE_ TYPE/ Registrant SIC Code Type	VARCHAR2(30))		The SIC Code Type of the registrant's company	hz_parties	SIC_CODE_TYPE
REG_SITE_USE_ CODE/ Registrant Site Use Code	VARCHAR2(30))		The site use code of the registrant's address	Not Used	Not Used
REG_STATE/ Registrant State	VARCHAR2(60))		The state of the registrant's address	hz_locations, hz_parties	STATE
REG_STREET/ Registrant Street	VARCHAR2(50))		The street of the registrant's address	hz_locations	STREET
REG_STREET_ NUMBER/ Registrant Street Number	VARCHAR2(50))		The street number of the registrant's address	hz_locations	STREET_NUMBER
REG_STREET_ SUFFIX/ Registrant Street Suffix	VARCHAR2(50))		The street suffix of the registrant's address	hz_locations	STREET_SUFFIX
REG_SUITE/ Registrant Suite	VARCHAR2(50))		The suite of the registrant's address	hz_locations	SUITE
REG_TAX_NAME/ Registrant Tax Name	VARCHAR2(30))		The tax name of the registrant's company	hz_parties	TAX_NAME
REG_TAX_ REFERENCE/ Registrant Tax Reference	VARCHAR2(50))		The tax reference of the registrant's company	hz_parties	TAX_REFERENCE
REG_TIME_ZONE/ Registrant Time Zone	NUMBER		The timezone of the registrant's address	hz_locations	TIME_ZONE

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_TOTAL_NO_OF_ORDER/ Registrant Total Number of Orders	NUMBER		Deprecated	hz_parties	TOTAL_NUM_OF_ORDERS
REG_TOTAL_ORDER_AMOUNT/ Registrant Total Order Amount	NUMBER		Deprecated	hz_parties	TOTAL_ORDERED_AMOUNT
REG_YEAR_ESTABLISHED/ Registrant Year Established	NUMBER		The year the registrant's company was established	hz_parties	YEAR_ESTABLISHED
REG_URL/ Registrant URL	VARCHAR2(2000)		The URL of the registrant's company	hz_contact_points, hz_parties	URL
ATT_PARTY_ID/ attendant Party ID Table Entry Required: Yes	NUMBER		The party id corresponding to the attendant (B2C) or the attendant's company (B2B).	hz_parties	PARTY_ID
ATT_PARTY_TYPE/ Attendant Party Type	VARCHAR2(30)		The Party Type of the attendant's company	hz_parties	PARTY_TYPE
ATT_CONTACT_ID/ Attendant Contact ID Table Entry Required: Yes	NUMBER		The party ID corresponding to the attendant	hz_parties	PARTY_ID
ATT_PARTY_NAME/ Attendant Party Name	VARCHAR2(360)		The name of the attendant's company (forces B2B).	hz_parties	PARTY_NAME
ATT_TITLE/ Attendant Title	VARCHAR2(30)		Title (Mr. Ms.) of the attendant	hz_org_contacts	TITLE

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_FIRST_NAME/ Attendant First Name Table Entry Required: Yes	VARCHAR2 (150)		First Name of attendant	hz_parties	PERSON_FIRST_ NAME
ATT_MIDDLE_ NAME/ Attendant Middle Name	VARCHAR2(60)		Middle name of attendant	hz_parties	PERSON_ MIDDLE NAME
ATT_LAST_NAME/ Attendant Last Name Table Entry Required: Yes	VARCHAR2 (150)		Last Name of attendant	hz_parties	PERSON_LAST_ NAME
ATT_ADDRESS1/ Attendant Address1	VARCHAR2 (240)F		Address (first line) of the attendant	hz_parties	ADDRESS1
ATT_ADDRESS2/ Attendant Address1	VARCHAR2 (240)F		Address (second line) of the attendant	hz_parties	ADDRESS2
ATT_ADDRESS3/ Attendant Address1	VARCHAR2 (240)F		Address (third line) of the attendant	hz_parties	ADDRESS3
ATT_ADDRESS4/ Attendant Address1	VARCHAR2 (240)F		Address (fourth line) of the attendant	hz_parties	ADDRESS4
ATT_GENDER/ Attendant Gender	VARCHAR2(30)		Gender of the attendant	hz_person_ profiles	GENDER
ATT_ADDRESS_ LINE_PHONETIC/ Attendant Address Line Phonetic	VARCHAR2 (360)		Phonetic address of the attendant	hz_ locations	ADDRESS_ LINES_ PHONETIC
ATT_ANALYSIS_ FY/ Attendant Analysis FY	VARCHAR2(5)		FY analysis for the attendant	hz_parties	ANALYSIS_FY
ATT_APT_FLAG/ Attendant Apt Flag	VARCHAR2(1)	Y/N	Whether or not the attendant's address is an apartment	hz_ locations	APARTMENT_ FLAG

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_BEST_TIME_CONTACT_BEGIN/ Attendant Best Time Contact Begin	DATE		Best time to begin contacting the attendant	hz_person_profiles	BEST_TIME_CONTACT_BEGIN
ATT_BEST_TIME_CONTACT_END Attendant Best Time Contact End	DATE		Best time to stop contacting the attendant	hz_person_profiles	BEST_TIME_CONTACT_END
ATT_CATEGORY_CODE/ Attendant Category Code	VARCHAR2(30)		Category code of the attendant	hz_parties	CATEGORY_CODE
ATT_CEO_NAME/ Attendant CEO Name	VARCHAR2(360)		CEO of the attendant's company	hz_organizational_profiles	CEO_NAME
ATT_CITY/ Attendant City	VARCHAR2(60)		City of the attendant's Address	hz_parties	CITY
ATT_CONTACT_ME_FLAG/ Attendant Contact Me Flag	VARCHAR2(1)	Y/N	Whether or not it is OK to contact the attendant (Do or Do Not Contact)	hz_contact_preferences	PREFERENCE_CODE (if Contact Type is ALL)
ATT_COUNTRY/ Attendant Country	VARCHAR2(60)		Country of the attendant's address	hz_parties	COUNTRY
ATT_COUNTY/ Attendant County	VARCHAR2(60)		County of the attendant's address	hz_parties	COUNTY
ATT_CURRENT_FY_POTENTIAL_REV/ Attendant Current FY Potential Revenue	NUMBER		Current fiscal year potential revenue of the attendant's company	hz_parties	CURR_FY_POTENTIAL_REVENUE
ATT_NEXT_FY_POTENTIAL_REV/ Attendant Next FY Potential Revenue	NUMBER		Next fiscal year potential revenue of the attendant's company	hz_parties	NEXT_FY_POTENTIAL_REVENUE

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_HOUSEHOLD_INCOME/ Attendant Household Income	NUMBER		Household income of the attendant	hz_person_profiles	HOUSEHOLD_INCOME
ATT_DECISION_MAKER_FLAG/ Attendant Decision Maker Flag	VARCHAR2(1)	Y/N	Whether or not the attendant is a decision maker	hz_org_contacts	DECISION_MAKER_FLAG
ATT_DEPARTMENT/ Attendant Department	VARCHAR2(360)		The attendant's company department	hz_org_contacts	DEPARTMENT
ATT_DUN_NO_C/ Attendant Dun No.	VARCHAR2(30)		The Duns Number of the attendant's company	hz_parties	DUNS_NUMBER
ATT_EMAIL_ADDRESS/ Attendant email address Table Entry Required: Yes	VARCHAR2(2000)		Email address of the attendant	hz_parties	EMAIL_ADDRESS
ATT_EMAIL_OK_FLAG/ Attendant Email OK Flag	VARCHAR2(1)	Y/N	Whether or not it is OK to email the attendant	hz_contact_preferences	PREFERENCE_CODE (if Contact_Type is EMAIL)
ATT_EMPLOYEE_TOTAL/ Attendant Employee Total	NUMBER		Employee total of the attendant's company	hz_parties	EMPLOYEES_TOTAL
ATT_FY_END_MONTH/ Attendant FY End Month	VARCHAR2(30)		The month in which the attendant's company's fiscal year ends	hz_parties	FISCAL_YEAREND_MONTH
ATT_FLOOR/ Attendant's Floor	VARCHAR2(50)		The floor (address) of the attendant	hz_locations	FLOOR
ATT_GSA_INDICATOR_FLAG/ Attendant GSA Indicator Flag	VARCHAR2(30)		The GSA Indicator Flag of the attendant's company	hz_parties	GSA_INDICATOR_FLAG

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_HOUSE_NUMBER/ Attendant House Number	NUMBER		The house number of the attendant's address	hz_locations	HOUSE_NUMBER
ATT_IDENTIFYING_ADDRESS_FLAG/ Attendant Identifying Address Flag	VARCHAR2(1)	Y/N	Whether or not this is the attendant's primary address	hz_party_sites	IDENTIFYING_ADDRESS_FLAG
ATT_JGZZ_FISCAL_CODE/ Attendant JGZZ FISCAL Code	VARCHAR2(20)		The JGZZ Fiscal Code of the attendant's company	hz_parties	JGZZ_FISCAL_CODE
ATT_JOB_TITLE/ Attendant Job Title	VARCHAR2(100)		The job title of the attendant	hz_org_contacts	JOB_TITLE
ATT_LAST_ORDER_DATE/ Attendant Last Order Date	DATE		Deprecated	hz_parties	LAST_ORDERED_DATE
ATT_ORG_LEGAL_STATUS/ Attendant Org Legal Status	VARCHAR2(30)		The legal status of the attendant's company	hz_organizational_profiles	LEGAL_STATUS
ATT_LINE_OF_BUSINESS/ Attendant Line of Business	VARCHAR2(240)		The line of business with which the attendant is associated	hz_organizational_profiles	LINE_OF_BUSINESS
ATT_MISSION_STATEMENT/ Attendant Mission Statement	VARCHAR2(2000)		The mission statement for the attendant's company	hz_parties	MISSION_STATEMENT
ATT_ORG_NAME_PHONETIC/ Attendant Org Name Phonetic	VARCHAR2(320)		The phonetic name of the attendant's company	hz_parties	ORGANIZATION_NAME_PHONETIC
ATT_OVERSEAS_ADDRESS_FLAG/ Attendant Overseas Address Flag	VARCHAR2(1)	Y/N	Whether or not the address is overseas	hz_locations	OVERSEAS_ADDRESS_FLAG

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_NAME_SUFFIX/ Attendant Name Suffix	VARCHAR2(30)		The suffix of the attendant (Jr., M.D., etc.)	hz_parties	PERSON_NAME_SUFFIX
ATT_PHONE_AREA_CODE/ Attendant Phone Area Code	VARCHAR2(10)		The area code of the attendant's phone number	hz_contact_points	PHONE_AREA_CODE
ATT_PHONE_COUNTRY_CODE/ Attendant Phone Country Code	VARCHAR2(10)		The country code of the attendant's phone number	hz_contact_points	PHONE_COUNTRY_CODE
ATT_PHONE_EXTENSION/ Attendant Phone Extension	VARCHAR2(20)		The extension of the attendant's phone number	hz_contact_points	PHONE_EXTENSION
ATT_PHONE_NUMBER/ Attendant Phone Number	VARCHAR2(40)		The attendant's phone number	hz_contact_points	PHONE_NUMBER
ATT_POSTAL_CODE/ Attendant Postal Code	VARCHAR2(60)		The postal code of the attendant's address	hz_parties	POSTAL_CODE
ATT_POSTAL_PLUS4_CODE/ Attendant Postal plus4 Code	VARCHAR2(4)		The postal plus-four code of the attendant's address	hz_locations	POSTAL_PLUS4_CODE
ATT_PO_BOX_NO/ Attendant PO Box No	VARCHAR2(50)		The PO Box number of the attendant's address	hz_locations	PO_BOX_NUMBER
ATT_PROVINCE/ Attendant Province	VARCHAR2(60)		The province of the attendant's address	hz_locations, hz_parties	PROVINCE
ATT_RURAL_ROUTE_NO/ Attendant Rural Route Number	VARCHAR2(50)		The rural route number of the attendant's address	hz_locations	RURAL_ROUTE_NUMBER

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_RURAL_ROUTE_TYPE/ Attendant Rural Route Type	VARCHAR2(30)		The rural route type of the attendant's address	hz_locations	RURTAL_ROUTE_TYPE
ATT_SECONDARY_SUFFIX_ELEMENT/ Attendant Secondary Suffix Element	VARCHAR2(30)		The secondary suffix (such as Jr. or M.D.) of the attendant	hz_locations	SECONDARY_SUFFIX_ELEMENT
ATT_SIC_CODE/ Attendant SIC Code	VARCHAR2(30)		The SIC Code of the attendant's company	hz_parties	SIC_CODE
ATT_SIC_CODE_TYPE/ Attendant SIC Code Type	VARCHAR2(30)		The SIC Code Type of the attendant's company	hz_parties	SIC_CODE_TYPE
ATT_SITE_USE_CODE/ Attendant Site Use Code	VARCHAR2(30)		The site use code of the attendant's address	Not Used	Not Used
ATT_STATE/ Attendant State	VARCHAR2(60)		The state of the attendant's address	hz_locations, hz_parties	STATE
ATT_STREET/ Attendant Street	VARCHAR2(50)		The street of the attendant's address	hz_locations	STREET
ATT_STREET_NUMBER/ Attendant Street Number	VARCHAR2(50)		The street number of the attendant's address	hz_locations	STREET_NUMBER
ATT_STREET_SUFFIX/ Attendant Street Suffix	VARCHAR2(50)		The street suffix of the attendant's address	hz_locations	STREET_SUFFIX
ATT_SUITE/ Attendant Suite	VARCHAR2(50)		The suite of the attendant's address	hz_locations	SUITE
ATT_TAX_NAME/ Attendant Tax Name	VARCHAR2(30)		The tax name of the attendant's company	hz_parties	TAX_NAME

Table D–3 Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_TAX_REFERENCE/ Attendant Tax Reference	VARCHAR2(50)		The tax reference of the attendant's company	hz_parties	TAX_REFERENCE
ATT_TIME_ZONE/ Attendant Time Zone	NUMBER		The timezone of the attendant's address	hz_locations	TIME_ZONE
ATT_TOTAL_NO_OF_ORDER/ Attendant Total Number of Orders	NUMBER		Deprecated	hz_parties	TOTAL_NUM_OF_ORDERS
ATT_TOTAL_ORDER_AMOUNT/ Attendant Total Order Amount	NUMBER		Deprecated	hz_parties	TOTAL_ORDERED_AMOUNT
ATT_YEAR_ESTABLISHED/ Attendant Year Established	NUMBER		The year the attendant's company was established	hz_parties	YEAR_ESTABLISHED
ATT_URL/ Attendant URL	VARCHAR2(2000)		The URL of the attendant's company	hz_contact_points, hz_parties	URL

D.4 Lead List Import Fields

The following field is new:

- PERSON_INITIALS

Obsolete columns:

- CUSTOMER_KEY
- ADDRESS_KEY
- CONTACT_KEY

Table D–4 Event List Import Fields

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	
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)				

Table D–4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
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				

Table D–4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
AUTO_REGISTER_FLAG	VARCHAR2(1)				
BUDGET_AMOUNT	NUMBER				
BUDGET_AMOUNT_1	NUMBER				
BUDGET_AMOUNT_2	NUMBER				
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				

Table D–4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
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				
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)				

Table D–4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
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
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				

Table D–4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
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				
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.

Table D–4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
LAST_UPDATED_BY	NUMBER	Yes			Populated by the list import program.
LEAD_DATE	DATE				
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 ams_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				
MARKETING_SCORE	NUMBER				
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

Table D–4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
NEW_LOC_FLAG	VARCHAR2				<< DO NOT POPULATE >> if 1 - this is a new location. If 0- this is already existing.
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				

Table D-4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
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
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'

Table D–4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
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				
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				

Table D-4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
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				
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.

Table D–4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
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				
REJECT_REASON_CODE	VARCHAR2				
REL_PARTY_ID	NUMBER				Relationship's party ID to which the relationship is mapped.
REQUEST_ID	NUMBER				
REQUEST_ID	NUMBER				]

Table D-4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
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'
SOURCE_CODE	VARCHAR2(30)		Yes	AMS_EVENT_OFFERS_ALL_B	

Table D–4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
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				

Table D–4 Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
USER_STATUS_ID	NUMBER		Yes	AMS_USER_STATUS LOOKUP	
VEHICLE_RESPONSE_CODE	VARCHAR2				
WAITLISTED_PRIORITY	VARCHAR2(30)				

Seeded User Statuses

This appendix outlines the various seeded user statuses found in Oracle Marketing.

Topics include:

- [Section E.1, "User Status Overview"](#)
- [Section E.2, "Seeded User Statuses"](#)
- [Section E.3, "User Status Limitations"](#)

E.1 User Status Overview

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.

E.2 Seeded User Statuses

The seeded User Status values are as follows:

Table E–1 Seeded User Statuses

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
Campaign Schedule Status	COMPLETED	Completed	Completed
Campaign Schedule Status	DENIED_BA	Budget Rejected	Denied Budget Approval
Campaign Schedule Status	NEW	New	New

Table E-1 Seeded User Statuses

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
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

Table E-1 Seeded User Statuses

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

Table E–1 Seeded User Statuses

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Marketing Event Agenda Status	CONFIRMED	Confirmed	Confirmed
Marketing Event Agenda Status	UNCONFIRMED	Unconfirmed	Unconfirmed
Marketing Event Registration Status	CANCELLED	Cancelled	Cancelled
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

Table E-1 Seeded User Statuses

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
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
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

Table E-1 Seeded User Statuses

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
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
Segment Status	DRAFT	Draft	Draft
Segment Status	EXPIRED	Expired	Expired

E.3 User Status Limitations

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.

