

Oracle® Marketing

User Guide

Release 11*i*

Part No. B10586-01

March 2003

Oracle Marketing User Guide, Release 11i

Part No. B10586-01

Copyright © 2003 Oracle Corporation. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information of Oracle Corporation; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent and other intellectual and industrial property laws. Reverse engineering, disassembly or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. Oracle Corporation does not warrant that this document is error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Oracle Corporation.

If the Programs are delivered to the U.S. Government or anyone licensing or using the programs on behalf of the U.S. Government, the following notice is applicable:

Restricted Rights Notice Programs delivered subject to the DOD FAR Supplement are "commercial computer software" and use, duplication, and disclosure of the Programs, including documentation, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement. Otherwise, Programs delivered subject to the Federal Acquisition Regulations are "restricted computer software" and use, duplication, and disclosure of the Programs shall be subject to the restrictions in FAR 52.227-19, Commercial Computer Software - Restricted Rights (June, 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and Oracle Corporation disclaims liability for any damages caused by such use of the Programs.

Oracle is a registered trademark, and Oracle Discoverer, Oracle MetaLink, and SQL*Plus are trademarks or registered trademarks of Oracle Corporation. Other names may be trademarks of their respective owners.

Send Us Your Comments

Oracle Marketing User Guide, Release 11i

Part No. B10586-01

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:

Oracle Corporation
Oracle Marketing Documentation Manager
500 Oracle Parkway
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.

Contents

Send Us Your Comments	iii
Preface.....	xi
Intended Audience	xi
How To Use This Guide	xi
Other Information Sources	xii
Do Not Use Database Tools to Modify Oracle Applications Data	xviii
About Oracle	xviii
 1 Introduction	
1.1 Oracle Marketing Product Overview	1-2
1.2 Oracle Marketing Key Benefits.....	1-3
1.3 Functional Areas.....	1-3
1.4 New in this Release	1-5
1.4.1 Oracle Marketing Enhancements.....	1-5
1.4.2 eMerchandising Enhancements	1-9
1.4.3 Data Mining Enhancements	1-10
1.4.4 Trade Management Enhancements	1-11
 2 Using Oracle Marketing	
2.1 Oracle Marketing Concepts	2-2
2.1.1 Understanding Lists	2-3
2.1.2 Understanding Segments.....	2-13
2.1.3 Understanding Campaigns.....	2-16

2.1.4	Understanding Events	2-17
2.1.5	Understanding Schedules	2-20
2.1.6	Understanding Products	2-22
2.1.7	Understanding Offers	2-29
2.1.8	Understanding Budgets.....	2-30
2.1.9	Understanding Approvals	2-41
2.1.10	Understanding Deliverables and Messages	2-43
2.1.11	Understanding Scripting/Survey Integration	2-45
2.1.12	Understanding Click-Through Destinations.....	2-47
2.1.13	Understanding Metrics, Costs and Revenues	2-50
2.1.14	Understanding Marketing Intelligence.....	2-55
2.1.15	Understanding the Marketing Calendar.....	2-56
2.1.16	Understanding User Profiles	2-57
2.1.17	Understanding Notes.....	2-57
2.1.18	About Attachments	2-58
2.1.19	Understanding Tasks	2-58
2.1.20	Understanding Teams	2-58
2.2	Oracle Marketing User Procedures.....	2-60
2.2.1	Creating and Managing Lists	2-61
2.2.2	Creating and Managing Imports.....	2-73
2.2.3	Creating and Managing Segments.....	2-82
2.2.4	Creating and Managing Campaigns.....	2-84
2.2.5	Creating and Managing Campaign Schedules	2-91
2.2.6	Creating and Managing Events.....	2-111
2.2.7	Creating and Managing Event Schedules.....	2-116
2.2.8	Creating and Managing Venues.....	2-123
2.2.9	Creating and Managing Products.....	2-125
2.2.10	Creating and Managing Offers.....	2-141
2.2.11	Creating and Managing Price Lists.....	2-145
2.2.12	Creating and Managing Budgets	2-146
2.2.13	Initiating Approvals.....	2-162
2.2.14	Creating and Managing Deliverables.....	2-163
2.2.15	Creating and Managing Messages.....	2-172
2.2.16	Creating and Managing Programs	2-175
2.2.17	Creating Click-Through Destinations	2-178

2.2.18	Working with Triggers	2-184
2.2.19	Associating and Managing Metrics, Costs and Revenues	2-191
2.2.20	Personalizing Home Page Bins, Reports, and Charts	2-241

3 Using eMerchandising

3.1	eMerchandising Concepts	3-2
3.1.1	Business Benefits of eMerchandising	3-2
3.1.2	eMerchandising Content	3-3
3.1.3	Personalizing eMerchandising Content	3-4
3.1.4	Content Displayed by eMerchandising	3-5
3.1.5	Using Stylesheet to Display the Content	3-5
3.1.6	Understanding Web Postings	3-6
3.1.7	Associated Placements	3-12
3.1.8	Runtime Actions	3-12
3.1.9	Understanding Web Placements	3-15
3.1.10	Extending eMerchandising	3-18
3.2	eMerchandising User Procedures	3-19
3.2.1	Managing eMerchandising Content	3-19
3.2.2	Managing Postings	3-25
3.2.3	Managing Placements	3-35
3.3	Troubleshooting	3-38

4 Using Data Mining

4.1	Understanding Data Mining	4-2
4.1.1	Understanding Model Building	4-4
4.1.2	Understanding Model Evaluation	4-8
4.1.3	Improving Model Results	4-12
4.1.4	About Scoring a Target Population with Your Model	4-13
4.1.5	Generating a List	4-15
4.2	Data Mining User Procedures	4-15
4.2.1	Building a Model	4-16
4.2.2	Viewing and Modifying a Model	4-27
4.2.3	Evaluating Model Build Results	4-33
4.2.4	Copying a Model	4-34
4.2.5	Scoring a Target Population	4-35

4.2.6	Modifying a Scoring Run	4-43
4.2.7	Viewing Scoring Run Results	4-44
4.2.8	Generating Lists from Scoring Run Results.....	4-47
4.2.9	Copying a Scoring Run.....	4-48
4.2.10	Creating Personalized Searches	4-49
4.2.11	Viewing Logs	4-50

5 Using Trade Management

5.1	Trade Management Concepts	5-2
5.1.1	Trade Management Overview	5-2
5.1.2	Trade Management Offers Overview	5-5
5.1.3	Trade Management Budget Overview	5-13
5.1.4	Trade Management Claims Overview	5-40
5.2	Trade Management User Procedures	5-63
5.2.1	Managing Trade Planning and Execution	5-63
5.2.2	Creating and Managing Forecasts	5-87
5.2.3	Creating and Managing Trade Management Budgets.....	5-93
5.2.4	Creating and Managing Claims	5-107

A Oracle Marketing User Interface Reference

A.1	Understanding the Oracle Marketing User Interface.....	A-2
A.2	Search Functionality	A-3
A.3	Tabs and Horizontal Navigation Links.....	A-4
A.3.1	The Home Page.....	A-4
A.3.2	The Product Tab	A-5
A.3.3	The Audience Tab	A-7
A.3.4	The Campaign Tab	A-10
A.3.5	The Event Tab	A-11
A.3.6	The Deliverable Tab	A-13
A.3.7	The Budget Tab.....	A-13
A.3.8	The Claim Tab.....	A-13
A.3.9	The Administration Tab	A-13
A.3.10	The Execution Tab	A-14
A.3.11	The Analytics Tab.....	A-14
A.3.12	The Calendar Tab	A-14

B Home Page Bin, Report, and Chart Reference

B.1	Home Page Bins.....	B-2
B.1.1	Campaign Effectiveness Bin	B-3
B.1.2	Completed Web Surveys Bin.....	B-4
B.1.3	Event Effectiveness Bin	B-6
B.1.4	Lead Import Statistics Bin	B-7
B.1.5	Lead to Opportunity Bin (Key Metrics)	B-9
B.1.6	Lead Quality Bin.....	B-12
B.1.7	Lead Sources Bin	B-14
B.1.8	Marketing Activities Bin	B-15
B.1.9	Marketing Budgets Bin.....	B-17
B.1.10	Response to Lead Bin (Key Metrics).....	B-20
B.1.11	Web Responses Bin	B-23
B.2	Home Page Reports.....	B-25
B.2.1	Budget Utilization Report (Budget by Total Amount)	B-27
B.2.2	Budgets by Activity Report	B-29
B.2.3	Budgets by Business Unit Report	B-30
B.2.4	Budgets by Campaign Report	B-31
B.2.5	Campaign Conversion Rate Report.....	B-32
B.2.6	Campaign Cost and Revenue Report.....	B-33
B.2.7	Campaign Cost, Revenue and ROI Report.....	B-35
B.2.8	Campaign to Order Report.....	B-36
B.2.9	Campaigns by Activity Report.....	B-37
B.2.10	Campaign Budget Amount by Activity Type Report.....	B-39
B.2.11	Campaigns by Leads and Opportunities Report.....	B-40
B.2.12	Completed Web Surveys by Campaign Report.....	B-41
B.2.13	Completed Web Surveys by Region Reports	B-42
B.2.14	Conversion Rates by Sales Group Report.....	B-43
B.2.15	Event Cost and Revenue Report	B-44
B.2.16	Event Cost, Revenue and ROI Report	B-46
B.2.17	Events by Budget Amount Report.....	B-47
B.2.18	Events by Event Type Report.....	B-48
B.2.19	Leads by Opportunity Report	B-49
B.2.20	Events by Registrants Report	B-50
B.2.21	Invalid Leads by Reason Report	B-51

B.2.22	Invalid Web Surveys by Reason Report.....	B-52
B.2.23	Lead Aging by Quality Reports	B-52
B.2.24	Lead Aging by Sales Group Report	B-53
B.2.25	Lead Assignment and Conversion by Sales Group Reports	B-54
B.2.26	Lead Import Statistics by Campaign Report	B-55
B.2.27	Lead Import Statistics by Region Report	B-56
B.2.28	Lead Quality by Campaign Report.....	B-57
B.2.29	Lead Quality by Region Report.....	B-58
B.2.30	Lead Quality by Status Report	B-59
B.2.31	Lead Sources by Campaign Report	B-60
B.2.32	Lead Sources by Region Report	B-61
B.2.33	Lead Sources by Status Report	B-62
B.2.34	Lead Status by Campaign Report	B-63
B.2.35	Responses by Activity Report.....	B-64
B.2.36	Responses by Campaign Report	B-65
B.3	Home Page Charts	B-67
B.3.1	Budget Utilization by Business Unit Chart	B-68
B.3.2	Budget Utilization by Category Chart	B-69
B.3.3	Campaigns by Leads Chart.....	B-69
B.3.4	Campaign by Opportunity Chart	B-70
B.3.5	Events by Attendance Chart	B-71
B.3.6	Events by Leads Charts	B-71
B.3.7	Events by Registrations Chart	B-72
B.3.8	Leads and Cost Per Lead Parameters	B-73
B.3.9	Lead to Opportunity Chart	B-73

Glossary

Index

Preface

Intended Audience

Welcome to Release 11i of the *Oracle Marketing User Guide*.

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

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

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 more information about 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 the features and benefits of Oracle Marketing.
- Chapter 2 describes key concepts and procedures relevant to core Oracle Marketing functionality.

- Chapter 3 describes key concepts, procedures, and troubleshooting tips relevant to Oracle Marketing's eMerchandising module.
- Chapter 4 describes key concepts and procedures for Oracle Marketing's data mining module.
- Chapter 5 describes key Trade Management concepts and procedures.
- Appendix A provides a reference for application tabs and horizontal navigation links. It also describes general search functionality.
- Appendix B provides a reference for home page bins, reports, and charts.

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 Implementation Guide

This guide provides detailed functional and integration setup information for technical consultants, application administrators, and implementation team members.

Oracle Advanced Pricing User Guide

This document provides information required 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.

SQL * Plus User's Guide and Reference

This guide provides information and guidelines for SQL *Plus commands that can be used during list import.

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 11*i*. 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.

OracleMetaLink

OracleMetaLink 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 *OracleMetaLink*, 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 *OracleMetaLink* 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. Sections 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. Home page 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 Web Script” 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. This functionality allows marketers to 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 other Corporate Web Sites:** An important enhancement has been made to posting functionality. It is now possible to pass a customer identifier as part of the external call to the eMerchandising engine which enables personalization of Web advertisements on other corporate Web sites and leverages the existing customer database.

- **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 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.

Using Oracle Marketing

This chapter describes key Oracle Marketing concepts and procedures. Sections include:

- [Section 2.1, "Oracle Marketing Concepts"](#)
- [Section 2.2, "Oracle Marketing User Procedures"](#)

2.1 Oracle Marketing Concepts

Topics in this section are grouped in the following categories:

- [Section 2.1.1, "Understanding Lists"](#)
- [Section 2.1.2, "Understanding Segments"](#)
- [Section 2.1.3, "Understanding Campaigns"](#)
- [Section 2.1.4, "Understanding Events"](#)
- [Section 2.1.5, "Understanding Schedules"](#)
- [Section 2.1.6, "Understanding Products"](#)
- [Section 2.1.7, "Understanding Offers"](#)
- [Section 2.1.8, "Understanding Budgets"](#)
- [Section 2.1.9, "Understanding Approvals"](#)
- [Section 2.1.10, "Understanding Deliverables and Messages"](#)
- [Section 2.1.11, "Understanding Scripting/Survey Integration"](#)
- [Section 2.1.12, "Understanding Click-Through Destinations"](#)
- [Section 2.1.13, "Understanding Metrics, Costs and Revenues"](#)
- [Section 2.1.14, "Understanding Marketing Intelligence"](#)
- [Section 2.1.15, "Understanding the Marketing Calendar"](#)
- [Section 2.1.16, "Understanding User Profiles"](#)
- [Section 2.1.17, "Understanding Notes"](#)
- [Section 2.1.18, "About Attachments"](#)
- [Section 2.1.19, "Understanding Tasks"](#)
- [Section 2.1.20, "Understanding Teams"](#)

2.1.1 Understanding Lists

List management is the process of analyzing, generating, and managing a list of customers or prospects. Marketers can enrich the list data by purchasing or renting the information from third-party vendors. By filtering the lists based on simple or complex criteria, marketers can generate target lists for specific marketing activities. For example, for a product launch campaign, a marketer could create a list of high-income families with kids.

Topics in this section include:

- [Section 2.1.1.1, "Lists Overview"](#)
- [Section 2.1.1.2, "Data Sources"](#)
- [Section 2.1.1.3, "List Types"](#)
- [Section 2.1.1.4, "List Selection"](#)
- [Section 2.1.1.5, "List Generation"](#)
- [Section 2.1.1.6, "De-duplication"](#)
- [Section 2.1.1.7, "List Import"](#)
- [Section 2.1.1.8, "Suppression Lists"](#)
- [Section 2.1.1.9, "Oracle Discoverer"](#)
- [Section 2.1.1.10, "List Management Business Areas"](#)

2.1.1.1 Lists Overview

A list is a group of customers and prospects that are typically based on user defined filter criteria. For example, for a product launch marketing campaign, a marketer may create a list of high-income families with kids living in San Francisco. Marketers can then target this list of customers to meet their marketing objective.

Oracle Marketing provides the necessary functionality to analyze, generate, and manage a list of customers and prospects. Lists may be sourced internally, from the Oracle Customer Model (TCA), or can be purchased or rented from a third-party vendor and imported for use within Oracle Marketing. You can use the list functionality to create a list which you can associate with a campaign schedule, events, offers, or market eligibility.

The list summary page displays all the lists that you have created in the application. You can personalize the attributes on this page by clicking on the Personalize button.

2.1.1.2 Data Sources

Data source is a flexible set of customer attributes that is used in the list management process. Data sources are defined and maintained in the Administration tab. It contains a mapping of columns from a source table or view to the Oracle Marketing List Entries tables (AMS_LIST_ENTRIES). This mapping provides the necessary information for the list generation process to copy the information from the source table or view to the List Entries table for use in list management.

Oracle Marketing provides two seeded data sources that contain mapping from the Oracle Customer Model to the List Entries table. The seeded data sources include:

- Persons
- Organization Contacts

The Persons seeded data source represents Business to Consumer (B2C) customer attributes such as first name, last name, marital status, household income, etc. The Organization Contacts seeded data source represents Business to Business (B2B) attributes such as first name, last name, job title, employee of, work e-mail address, etc.

You can also create a user-defined data source (for example, against an external data warehouse) for use within list management. See the *Oracle Marketing Implementation Guide* to set up data sources.

There are two types of data sources – Master and Sub Type. A Master type is typically the highest level of detail information needed for list generation. For example, Person Details is a Master type which contains information such as the person's full name, marital status, household income, and household size. The phone information about the person is a Sub Type and contains information such as phone number, last contact date and time, and contact attempts. The phone information Sub Type can be associated not only with this Master type, but with others, too.

A list of defined data sources is displayed when you click the Administration > Audience > Data Source hyperlink. Oracle Marketing provides several seeded data sources for use with the seeded Oracle Marketing Discoverer Business Areas. These seeded data sources are editable but should be used as templates so as to preserve the original intent.

2.1.1.3 List Types

There are three types of lists that are available within the List functionality. The list types and their functions are listed in the following table.

Table 2–1 List Types

List Type	Description
Standard	A standard list is a combination of other lists (manual, standard or import lists), segments, Oracle Discoverer workbooks or SQL queries. The components of the list can be combined using different operations such as include, exclude, or intersect.
Manual	You build this list by manually selecting customers and/or prospects from a data source, such as Persons or Organization Contacts.
Suppression	Use suppression lists when you want to automatically exclude prospects or customers from specific marketing activities. For more information see Section 2.1.1.8, "Suppression Lists" .

The basis for the creation of Standard, Manual or Suppression lists are the same. However, the attributes that are defined may vary in each of the list types.

In addition, you can also import a list of customers or prospects from an external data source and use the list for future marketing activities. For more information, see [Section 2.1.1.7, "List Import"](#).

2.1.1.4 List Selection

Lists can be created by combining any of the following sources:

- Other Lists: Manual, Standard, Suppression, Import
- Segments
- Discoverer Workbooks
- SQL Queries

A list can be composed by selecting data from one or more of the sources mentioned above. If a list is comprised of multiple sources, then the sources can be combined using different operations. There are three different ways of combining multiple record sources:

- Include: all the records in this record source (or line item) are included in the list

- **Intersect:** all the records that are common between this record source and in the list, up to this point, remain on the list. For example, several lists of college graduates are included and then intersected with a list of California state residents. The resulting list contains only college graduates who live in California.
- **Exclude:** all the records in this record source are excluded from the list

You can also indicate the order in which to combine lists from multiple sources.

2.1.1.5 List Generation

After you have selected your list data, you can direct the system to generate the list either immediately or at a pre-defined future date. The list generation process involves combining the data from different sources (list selection), applying any de-duplication and word standardization rules to the list data and finally inserting this data to the Oracle Marketing List Entries table. When a list is successfully generated, it can either be used to generate a target group for a specific marketing activity or can be exported to a third-party fulfillment house for outbound execution.

2.1.1.6 De-duplication

During the generation process of a list, de-duplication rules (defined by your System Administrator) can be applied to eliminate duplicate records in the list. This ensures that a customer or prospect is not contacted twice within the same marketing activity. The seeded de-duplication rules that can be applied include:

- **E-mail De-dupe:** Dedupe all records with the same First Name, Last Name, E-mail Address
- **Address De-dupe:** De-dupe all records with the same First Name, Last Name, Address1, Address2, State, City, Postal Code, Country
- **Phone De-dupe:** De-dupe all records with the same First Name, Last Name, Phone Area Code, Phone Number, Phone Extension
- **Fax De-dupe:** De-dupe all records with the same First Name, Last Name, Area Code, Fax Number

Your system administrator can extend the list of attributes within the seeded de-duplication rules. In addition, your System Administrator can also set up additional de-duplication rules by selecting from a list of customer attributes. Some word standardization rules can also be applied during the de-duplication process. The word standardization ensures, for example, that “200 Main Street” and “200 Main St” are considered the same address in the de-duplication rule.

2.1.1.7 List Import

Oracle Marketing offers a list import process, enabling marketers to map an external data source, such as a purchased or rented list, or an existing customer database, to destination target fields either within the Oracle Customer Model or a staging area within Oracle Marketing (for rented lists). This enables marketers to enrich their customer data with purchased lists and also consolidate their customer data from legacy systems. Out-of-the-box, the list import capability facilitates the importing of

- Prospects for marketing campaigns
- Customers into the Oracle Customer Model (TCA)
- Leads for following up by Oracle TeleSales
- Event registrants for processing in Oracle Marketing's event module

The list import process imports records (in .csv or xml format) from a client desktop, server or an ftp site. For additional details of importing from a server or ftp site refer to the *Oracle Marketing Implementation Guide*.

The list import process is presented in the form of a wizard to lead the user through the process of importing a rented or purchased list of prospects. The steps in the wizard include:

1. Selecting the Import Type (Persons, Organization Contacts, Leads, Event Registrants)
2. Specifying the location of the file
3. Mapping the fields between the source file and the destination columns (for a list of fields that can be imported refer to the *Oracle Marketing Implementation Guide*)
4. Importing the list import table with the source data

Once the records have been imported, they may be used to generate lists for use with campaigns, events or offers.

Rented vs. Purchased Lists

During the import process, you can specify if the source for the import data is from a Rented or Purchased list. The following table highlights the difference in processing for these two sources.

Table 2–2 Rented vs. Purchased Lists

Rented List	Purchased List
Data stored within a staging area (AMS_LIST_ENTRIES) in Oracle Marketing	Data stored within the staging area and are added to the Oracle Customer Model (TCA)
Dummy, inactive records created in Oracle Customer Model (TCA) for the corresponding records	Corresponding customer information is inserted into the Oracle Customer Model (TCA)
Rented records are purged based on usage or expiry date	Purchased records are not purged and are maintained within the Oracle Customer Model (TCA)

2.1.1.8 Suppression Lists

Oracle Marketing helps companies to comply with privacy policies by providing pre-defined suppression filters. These filters are applied automatically to every target list so that customers who have opted-out of receiving promotional campaigns are not targeted. Marketers can also create their own user-defined suppression filters and apply them globally to all campaigns, campaigns based on activity (e-mail, direct mail or telemarketing) or only to specific campaigns. Based on this level, the suppression list is automatically applied to filter the target groups of any campaign schedule.

Out-of-the-box, Oracle Marketing provides 10 seeded suppression lists. These include:

- Do Not Contact for Persons and Organization Contacts
- Do Not Mail for Persons and Organization Contacts
- Do Not Phone for Persons and Organization Contacts
- Do Not E-mail for Persons and Organization Contacts
- Do Not Fax for Persons and Organization Contacts

The seeded suppression lists are based on information stored in the HZ_CONTACT_PREFERENCES table of the Oracle Customer Model (TCA).

In addition to the previously described suppression method, Oracle Marketing provides marketers with the ability to capture opt-out contact preferences for channels, contact points, product interest and promotion by customizing the contact preferences pages for marketing activities. These “self-service” screens enable targeted prospects/customers to unsubscribe from future activities by providing the appropriate information.

When a contact un-subscribes, this preference is captured and maintained as part of the suppression list, thereby automatically excluding this contact from future marketing activities (based on the contact’s preferences). By capturing preference information directly from targeted individuals, this feature helps marketers target the right people at the right times using the right channels.

2.1.1.9 Oracle Discoverer

Oracle Discoverer is a tool that allows a user with little or no database knowledge to easily create ad-hoc queries to generate a group of records within a Discoverer Worksheet. You can group a set of related Worksheets into Workbooks. You can use Discoverer within Oracle Marketing to query the customer database for records that meet a user defined criteria. You can then use the selected records to generate a list. You can also use the query conditions to create a Segment.

See the *Oracle Discoverer Administration Guide* for more information on Oracle Discoverer.

2.1.1.10 List Management Business Areas

Oracle Marketing includes seeded Business Areas in Oracle Discoverer that are specific to Oracle Marketing. Seeded Business Areas help to simplify the task of segmentation and list management for consumer (Person) and business (Organization) customers and prospects. The seeded business areas are Oracle Marketing Person List Management and Oracle Marketing Organization List Management.

Person List Management Business Area

The Oracle Marketing Person List Management Business Area contains intuitive folders and items that enable marketers to create Oracle Discoverer workbooks that select persons meeting specified criteria. The criteria are based on attributes of an individual such as profile information (languages, interests, employment, education), demographics, historical interactions with the enterprise (such as previous orders), campaign and event solicitation history, and list source information.

EXAMPLE: You need to create a list of persons that satisfy the below criteria. This business area contains all necessary folders and items for a marketer to select a list of persons that meet this criteria.

- Live in France
- Speak English
- Have been customers for at least one year
- Have master’s degrees
- Have been working for more than 2 years
- Have a current balance with the enterprise of over \$100
- O.K. to contact via e-mail
- Have not been solicited in a campaign in the last 3 months
- Have interacted with our call center agency 5 times or more in the past year
- Have purchased a certain product in the past 6 months

The folders and items in the following table are an example of what to select to produce the above results. Conditions should be created as appropriate to specifically produce the result set of the example. For example, you would create a Language Name condition where the abbreviated Language Name is equal to English.

Folder	Items
Person List Details	Mandatory ID
	Include E-mail
	Include Fax
	Person Name
	Country Name
Person Languages	Language Name
Person Education	Degree Received
Person Employment	Employment Begin Date
Organization and Person Quotes and Orders All	Ordered Date
	Payment Amount

Folder	Items
	Marketing Source Code Identifier
Organization and Person Contact Restrictions	Do Not Contact Type

Organization List Management Business Area

The Oracle Marketing Organization List Management Business Area contains intuitive folders and items that enable marketers to create Discoverer Workbooks that select contacts for, or employees of, organizations meeting specified criteria. The criteria are based on attributes of the organization as well as persons within the organization, and include the following:

- Organization and person profile information
- Account and contact information
- Interactions with the enterprise (such as previous orders)
- Campaign and event solicitation history
- List source information

You can accomplish the following approaches to Business to Business (B2B) list selection using the Oracle Marketing Organization List Management Business Area:

- Organization-related criteria (Company Profile and Financials)
- Account and Account Roles
- Contact Persons or “Employees Of” and their roles
- Sites and Locations

Users can define organization criteria first and then pull in all related contact persons, or users can define the contact persons first and pull in related organization information.

EXAMPLE 1: Organization criteria followed by Contact Person criteria

Determine which Organizations meet the following criteria:

- High-tech businesses based on SIC code
- Number of employees greater than 1000
- Have been in business for more than 2 years
- Have not been solicited in a campaign last 3 months

- Have interacted with our call center agency 5 times or more in the past year
- Have purchased a certain product in the past 6 months

Then apply the Contact Person criteria to obtain the marketing list:

- Contact is an Information Technology Manager or equivalent
- O.K. to contact via e-mail

EXAMPLE 2: Contact Person criteria first followed by Organization criteria

The folders and items listed below are an example of what to select to produce the above results. Conditions should be created as appropriate to specifically produce the result set of the above example. For example, create a condition on Employees Total where the Employees Total is greater than 1000.

Folder	Item
Organization Contact List Details	Mandatory ID
	Include E-mail
	Include Fax
	Party ID
	Party Contact Name
Organization List Details	Party ID
	Organization Name
	Employees Total
	SIC Code
	Establishment Year
Organization and Person Quotes and Orders All	Ordered Date
	Marketing Source Code Identifier
Organization and Person Contact Restrictions	Do Not Contact Type

Once the workbook is created from within Oracle Discoverer, it can be associated to segments and lists to define specific criteria.

2.1.2 Understanding Segments

Market segmentation is a method of identifying a group of consumers within a broader market that has a similar characteristics and needs. For example, a car manufacturer may need to identify different types of consumers based on style preferences, so they will segment their car buying market accordingly. Once segments are identified, marketers can develop different marketing programs that will uniquely target each segment.

Topics in this section include:

- [Section 2.1.2.1, "Segments Overview"](#)
- [Section 2.1.2.2, "Segment Hierarchies"](#)
- [Section 2.1.2.3, "Segment Attributes"](#)
- [Section 2.1.2.4, "Lists vs. Segments"](#)

2.1.2.1 Segments Overview

A segment is a saved set of criteria which you can use to generate a list or define a population of customers or prospects. For example, you could define a segment as all high-income families living in the state of New York.

You create segments from either an Oracle Discoverer Workbook or a SQL statement. Unlike a list, which has a fixed set of entries, the entries within a segment may differ over time as customers and prospects who meet the criteria specified in the segment definition are added and withdrawn from the organization's customer database.

The segment summary page displays all the segments that you have created within Oracle Marketing. You can personalize the attributes on this page by clicking on the Personalize button.

2.1.2.2 Segment Hierarchies

Segments can be organized into a segment hierarchy, in which each child segment contains a subset of the entries in their parent segment.

Consider the following example:

Segment A: All customers in the organization's customer database

Segment B: High-income families

Segment C: Families with kids

If we define Segment B to be a child segment of Segment A, and Segment C to be a child segment of Segment B, then the segment hierarchy will look like this:

Table 2–3 Segment Hierarchy Example

Segment Name	Segment Criteria	Segment Count	Segment Hierarchy	Segment Condition
Segment A	All Customers	100000	N/A	N/A
Segment B	High Income Families	25000	Child Segment of Segment A	Intersection of Segment B and Segment A
Segment C	Families with Kids	10000	Child Segment of Segment B	Intersection of Segment C and Segment B

You can also define a list from any of the available segments.

2.1.2.3 Segment Attributes

Segment functionality allows you to create, edit and manage segments. A segment has the following attributes:

Table 2–4 Segment Attributes

Name	Description
Segment Name	Unique name for the segment.
Code	Unique code value for the segment.
Parent Segment	The name of the parent segment. This is used to build a segment hierarchy.
Status	Displays the current status of the segment. Values include: Draft, Available, and Cancelled.

Table 2–4 Segment Attributes

Name	Description
Type	Can be an Oracle Discoverer Workbook or SQL. - For selection type SQL, enter the SQL statement in the SQL text field. Your SQL must be a valid SQL statement and at least one master type data source key should exist in your select statement. For example, <pre>Select 'PERSON_LIST', AMS_PERSON_DETAILS_V.party_id from AMS_PERSON_DETAILS_V where rownum < 100</pre> Note: Your SQL cannot contain “Order By” or “Group By” clauses within the statement. - For selection type Workbook, select the flashlight icon to choose a Workbook. The associated SQL statement for the Workbook will be displayed in the SQL section. This SQL statement is not editable.
Owner	The person responsible for creating and maintaining the segment.
Description	Provide a description of the segment.
Create List Button	Use to generate a list based on the criteria specified in the segment.
Preview Count	Use to preview the current number of records in a segment.

2.1.2.4 Lists vs. Segments

The following table describes the differences between lists and segments.

Table 2–5 Lists vs. Segments

List	Segments
Static in nature	Dynamic (segments can potentially generate a different set of records each time they are used)
Composed of actual information	A query definition that can be used to generate a list
Flat, non-hierarchical	Hierarchies can be created
Tactical	Strategic

2.1.3 Understanding Campaigns

Topics in this section include:

- [Section 2.1.3.1, "Campaign Overview"](#)
- [Section 2.1.3.2, "Campaign Processes"](#)

2.1.3.1 Campaign Overview

A marketing campaign is a collection of marketing activities designed to support a goal. Campaigns are the vehicle for putting information about an organization's products, services, offers, and messages in front of customers and potential customers.

Marketing campaigns consist of the campaign and its "schedules" or marketing activities. A schedule determines when, where and how a campaign activity is executed. A particular campaign may have multiple schedules for many different marketing channels and for execution of a campaign over a period of time.

For example, Vision Mobile wants to promote their new wireless instant messaging. They create a campaign called "Wireless IM Promotion" and under that campaign they add schedules. They might add an outbound telemarketing component in which telemarketing representatives cold call a list of people to see if they want the new service. They might have a banner ad that promotes the service and brings people back to a web registration page. They might also have an e-mail blast that goes out to a list of contacts who then click on a link to come back to a web registration.

Because all campaigns are not created alike, Oracle Marketing allows for custom setups to easily configure campaigns for different activities and marketing channels. Campaigns often create a hierarchal structure and can be divided by geography, by product or by marketing channel.

Oracle Marketing also provides out-of-the-box calculations for key metrics such as leads and opportunities generated, campaign registrations, and budget utilization. These scalable calculations enable marketers to evaluate critical marketing performance indicators and the effectiveness of their campaign spending and also determine which channel is most effective.

2.1.3.2 Campaign Processes

Campaigns are constructed using a wide variety of marketing objects. The basic components of campaigns are its theme, the funding (budgets), the execution (schedules), the target audience (lists and marketing mediums), the cost (costs) and response measuring devices (metrics).

A basic marketing campaign can be divided into several processes. These include:

- Defining Marketing Objectives
- Creating the Campaign and Determining the Budget
- Obtaining Approvals
- Selecting Products and Associating Offers and Deliverables
- Creating a Campaign Schedule
- Creating a Target List
- Associating Campaign Metrics
- Executing the Campaign
- Analyzing the Campaign

2.1.4 Understanding Events

Topics in this section include:

- [Section 2.1.4.1, "Events Overview"](#)
- [Section 2.1.4.2, "Event Building Blocks"](#)
- [Section 2.1.4.3, "Event Venues"](#)
- [Section 2.1.4.4, "One Off Events"](#)
- [Section 2.1.4.5, "Event Registration"](#)
- [Section 2.1.4.6, "Event Agendas"](#)
- [Section 2.1.4.7, "Event Rosters"](#)

2.1.4.1 Events Overview

Marketers often participate in trade shows, conduct seminars, and create Web events to generate leads. These types of events are the key means for marketers to educate potential customers about a product or service and to build a brand recognition. Oracle Marketing provides comprehensive functionality to manage key marketing events. Both online events and offline events can be managed.

An event can be a seminar, a class, a product demonstration, or any other activity that is location specific. You can create an event as a stand-alone activity or as part of a campaign. Using Events, a marketer can:

- Track and distribute event information. This includes information about event's speakers, directions, deliverables, budgets and registration.
- Manage open and restricted registration using rules and lists
- Facilitate registration (from Oracle TeleSales, Oracle Marketing, and external sources)
- Integrate with call centers to distribute information and to facilitate registration
- Send enrollees event deliverables that includes descriptions, directions, maps, and cover letters using Oracle TeleSales.

Note: The user setting up events must be assigned the JTF Fulfillment Admin role. For more information on how to assign this role, see the *Oracle Marketing Implementation Guide*.

2.1.4.2 Event Building Blocks

Use event building blocks to store general information about an event such as the description, costs, deliverables, venue, directions to the event, and optionally, the campaign used to promote the event. A company offering a sales seminar worldwide, for example, enters the information common to all the individual country sales seminars in an event. This information can then be customized for each separate country, location and time using event schedules.

You can also customize the general information you entered in events to create events, event schedules, and one-off events and to track participation and enrollment in each. For example, a country manager of the company offering a sales seminar worldwide creates an event schedule for the local seminar with its own times, speakers, and costs associated with each specific event.

2.1.4.3 Event Venues

A event venue is the physical location where the event will be executed. It could be a Hotel, Convention Center, etc. Information for the venue address, capacity, and venue contacts can be provided for the venue. Each venue can have various rooms and rates associated to it.

Venue Room

Once you create a venue, you must then identify the available space within the venue. You do this using Venue Room functionality.

Venue Rates

Use this functionality to indicate the quoted rates so that event planners can use the information to gauge their forecasted costs. The rates entered here are for reference only and can be used as a gauge to estimate costs. The actual cost of the venue may vary based on season, customer, type of event, and additional services.

2.1.4.4 One Off Events

One-off events are events which will not be repeated at regular intervals. For example, a CEO breakfast could be considered a one-off event. It is not truly part of a marketing campaign, but can stand alone or be tied to a program so as to capture costs.

2.1.4.5 Event Registration

Event registration functionality enables users to search for events through a simple search that returns results of events in which a user can register to an event. By default, the Search Results overview screen contains the most recent events for which users can register.

Event registration allows the registration of all parties within the database. In addition, events can be classified as “Invite Only.” In the case of events with invite lists, only users on the invite list are allowed to register for the event.

Use this functionality register attendees for an event and to support employees in registering themselves for an event. Managers can register themselves, as well as their direct reports, as desired. If an employee does not have access to Oracle Marketing, this tab is also accessible within other applications, such as Oracle Sales Online, for enrollment in events.

Note: The Event Registration screen is used only for registering contacts or employees of your organization. To register people outside your organization, you must Oracle TeleSales or registration import.

2.1.4.6 Event Agendas

The event agenda broadly describes the activities that will take place during the execution of an event. The event agenda contains details about the tracks and session within the event.

2.1.4.7 Event Rosters

The event roster is applicable for events where registration is required. The event registration roster contains information regarding the customers who have registered for the event. In addition to the registrants' information, the roster also indicates the channel of registration and additional information regarding the attendance.

2.1.5 Understanding Schedules

Topics in this section include:

- [Section 2.1.5.1, "Schedules Overview"](#)
- [Section 2.1.5.2, "Understanding Triggers"](#)
- [Section 2.1.5.3, "Understanding Target, Control, and Contact Groups"](#)

2.1.5.1 Schedules Overview

Schedules set up the actual delivery of the marketing campaign. They determine when specific marketing activity is going to take place, what the methodology of that activity is, and how the responses will be captured. They also determine how any mailing or calling lists, cover letters or other content are used and what deliverables, if any, are involved.

Schedules can be triggered. That is, some threshold must be reached before a schedule will be activated. For example, if the response rate in a particular test market reaches a given threshold, then campaign schedule for a larger test market is activated.

2.1.5.2 Understanding Triggers

Triggers are used to activate a campaign schedule when a specified threshold or criteria is reached. For example, a trigger may test the responses to an in-state campaign. If the level of responses reaches a certain level, a regional campaign is activated. Likewise, triggers may be used to create campaign waves. An initial campaign may offer a particular product. A second wave campaign, triggered to execute a month after the initial campaign may offer accessories only to customers

who purchased the product during the initial campaign. The ability to execute triggered campaign schedules is only available for direct marketing e-mail.

2.1.5.3 Understanding Target, Control, and Contact Groups

A Target Group for a campaign schedule specifies the list or lists associated with the campaign schedule. You can generate a target group using any combination of the following:

- List
- Segment
- Employee List

A segment is a dynamic criteria that will be executed when the target group is generated. For example, a segment could be defined as a condition to obtain residents living in the state of California. If this segment is associated with a target group, then the number of records satisfying the segment criteria at the time of generating the target group will be considered as part of the target list entries.

However, for a List or Employee List, the number of entries is static. This implies that if a list or employee list is associated with a target group, then the static number of entries in these lists when they were generated will automatically become part of the target group list entries.

A Control Group is a group of list entries who do not receive campaign information. While generating a Target Group, you can specify the number of records to be included in the Control Group. For example, based on your marketing criteria, you could have 5000 prospects being targeted for a direct marketing activity. You could then create a Control Group of 250 (5%) prospects who will not be contacted for this direct marketing activity. The responses from the Control Group may be compared with the responses from target records that receive the campaign information to determine the benefits of marketing to customers and prospects who meet the list criteria.

A Contact Group is a group of list entries who are actually contacted through a marketing activity. The Contact Group is obtained by taking the count of the associated lists (or segments) for the Target Group, subtracting the Control Group records, and adjusting for any suppression and duplicate records. For example, based on your marketing criteria, you could have 5000 prospects being targeted for a direct marketing activity. You could then create a Control Group of 250 (5%) prospects who will not be contacted for this direct marketing activity. You will then have 4750 prospects who will automatically become part of the Contact Group (assuming no suppression and duplicate records). The responses from the Contact

Group can be compared with the Control Group responses to measure the effectiveness of the marketing campaign.

Within Oracle Marketing, generating a target group will automatically apply suppressions and de-duplicates amongst the list sources that were selected to make up the target group. You can also view the record counts and the record entries for each of the sources (list, segment, employee list) and for the target group per se (control group records are flagged). Once generated, the list of target group entries will be available for outbound execution (direct mail, e-mail, etc.).

2.1.6 Understanding Products

Topics in this section include:

- [Section 2.1.6.1, "Products Overview"](#)
- [Section 2.1.6.2, "Understanding Inventory Attribute Templates"](#)
- [Section 2.1.6.3, "Seeded Inventory Attribute Templates"](#)

2.1.6.1 Products Overview

The Products tab provides you with the ability to review, maintain, and create new and existing products. In relation to this functionality, a product is considered anything you make, purchase or sell, including physical items you can stock in inventory. By this definition, a product is not necessarily physical; it can also be a service, or a combination of physical items and services. A grouping of products is often referred to as a product bundle.

Products functionality enables marketing personnel to easily access all product-related information and attributes required to better target, define, and manage marketing initiatives. It also provides a consolidated view of all marketing-related product information and the key ERP (Enterprise Resource Planning) decision-making variables from inventory, purchasing, sales and customer relationship management modules.

Note: Oracle Marketing supports access to the basic features of Oracle Inventory. Depending on your business practices, your organization may require you to set up further parameters in Oracle Inventory before the manufacturing and shipping of a product or bundle. See the *Oracle Inventory User's Guide* and the *Oracle Marketing Implementation Guide* for more information.

2.1.6.2 Understanding Inventory Attribute Templates

Oracle Marketing provides default inventory attribute templates based on whether you are defining a product or a service. The template can be overridden by selecting or de-selecting the desired product attributes. For each product attribute grouping, you can specify whether the checkbox defaults to being checked or unchecked and whether the default can be overridden or not. You can define the list of product attributes for each responsibility and you can also specify if the product attributes are editable in the product 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.

In addition, this flexibility allows you to display only relevant product attributes and quickly create a product ensuring that the requisite attributes are available.

2.1.6.3 Seeded Inventory Attribute Templates

The following tables describe the inventory attributes that are specified in the seeded product and service templates. By default, all inventory attributes are checked in the seeded templates.

Table 2–6 Product Template Inventory Attributes

Section	Check Box/LOV	Description
Inventory		
	Inventory Item	Specifies whether to stock and transact this item in Oracle Inventory. If you turn this option on, the item is automatically assigned to the default category set for the Inventory functionality.
	Stockable	Specifies whether the product or bundle is available for inventory stocking. Selecting this option enables you to select the Transactable check box.
	Transactable	Specifies whether to allow inventory transactions. You can set this attribute only when you turn on the Stockable option. This attribute is optionally set by the Item Status code. Note: Oracle Order Management uses this along with stockable and returnable to determine which authorized returned items can be physically received into inventory.

Table 2–6 Product Template Inventory Attributes

Section	Check Box/LOV	Description
	Revision Control	Specifies whether to track inventory balances by revision. If you turn this option on you must specify an existing revision number for issues and receipts. Note: You cannot change revision control when an item has quantity on hand. If Revision Control is controlled at the Master Item level, the check for on-hand quantity is against the sum of on-hand quantities in all child organizations.
Bill of Material		
	BOM Item Type	Specifies the bill of materials type of item.
	BOM Allowed	Specifies whether to allow the creation of a bill of materials for the item.
	Pick Components	Specifies whether all shippable components should be picked.
Costing		
	Cost Enabled	Specifies whether to report, value, and account for any item costs. For example, you might disable costing for reference items, or for invoice only (non-stock) items that you never ship and never hold in inventory. This is an item defining attribute. If you turn this option on, the item is automatically assigned to the default category set for the Oracle Cost Management functional area. Note: Organizations using average costing always maintain their own item costs, regardless of the control level set for the Costing Enabled attribute.
Physical Attributes		
	Collateral Item	Specifies whether the item is marketing collateral.
	Electronic Format	Specifies whether the item is in electronic format.
	Downloadable	Specifies whether the item can be downloaded.
	OM Indivisible	Specifies whether the item can be ordered in fractions.

Table 2–6 Product Template Inventory Attributes

Section	Check Box/LOV	Description
	Product Weight	Specifies the unit of measure of the unit weight.
	Unit Weight	Specifies the weight of the product.
Order Management		
	Customer Orderable	Specifies whether an item is orderable by external customers. You can initially define an item with Customer Orderable selected and Customer Orders Enabled de-selected. This means prices can be defined for the item, but no orders can be placed for it.
	Customer Order Enabled	Specifies whether an item is currently customer orderable.
	Internal Orderable	Specifies whether to allow the item to be ordered on an internal requisition.
	Internal Order Enabled	Specifies whether you can currently order the item internally.
	Shippable	Specifies whether to ship an item to a customer. Shippable items are released by Oracle Shipping Execution's Pick Release program, creating confirmable shipping lines, and are printed on the pick slip. A warning is issued if you change the value of this attribute when open sales order lines exist. This attribute must be turned off if the BOM Item Type attribute is set to Planning.
	Returnable	Specifies whether to allow customers to return an item.
	Activation Required	Turn this attribute on if customer is required to activate the Product; this option is generally used for communication products.
	Assemble to Order	Select this if the item is generally built for sales order demand.
Invoiceable		
	Invoiceable	Specifies whether the item can be included on an Oracle Receivables invoice.

Table 2–6 Product Template Inventory Attributes

Section	Check Box/LOV	Description
	Invoiced Enabled	Specifies whether to activate an item for invoicing in Oracle Receivables. If Invoiceable Item is turned on, you can temporarily exclude from invoicing by leaving Invoice Enabled turned off. If you turn this option on, the item appears in the Invoice Entry item list of values in Oracle Receivables. If you turn this feature off, the item does not appear in the list of values and Auto Invoice rejects the item.
Service		
	Serviceable Product	Specifies whether the item is serviceable or not.
	Subscription Dependency Enabled	Specifies whether a subscription is dependent on a prerequisite grouping of parts or services
	Defect Tracking	Specifies whether defects related to the item should be tracked.
	Install Base	Specifies whether the item is Oracle Install Base trackable.
	Contract Item Type	Indicates the contract item type.
	Billing Type	Specifies the billing type for the customer.
Web		
	Back Orderable	Specifies whether this item can be back-ordered on Oracle iStore.
	Orderable on Web	Specifies whether this item can be orderable on Oracle iStore.
	Web Status	Specifies whether the item is to be published to a Web store.

Table 2–7 Service Template Inventory Attributes

Section	Check Box/LOV	Description
Bill of Material		Note: This section only appears in the Service template for items for which the contract type is “warranty.”
	BOM Item Type	Specifies the bill of materials type of item.

Table 2–7 Service Template Inventory Attributes

Section	Check Box/LOV	Description
	BOM Allowed	Specifies whether to allow the creation of a bill of materials for the item.
	Pick Components	Specifies whether all shippable components should be picked.
Costing		
	Cost Enabled	Specifies whether to report, value, and account for any item costs. For example, you might disable costing for reference items, or for invoice only (non-stock) items that you never ship and never hold in inventory. This is an item defining attribute. If you turn this option on, the item is automatically assigned to the default category set for the Oracle Cost Management functional area. Note: Organizations using average costing always maintain their own item costs, regardless of the control level set for the Costing Enabled attribute.
Physical Attributes		
	Collateral Item	Specifies whether the item is marketing collateral.
	Electronic Format	Specifies whether the item is in electronic format.
	Downloadable	Specifies whether the item can be downloaded.
	OM Indivisible	Specifies whether the item can be ordered in fractions.
	Product Weight	Specifies the unit of measure of the unit weight.
	Unit Weight	Specifies the weight of the product.
Order Management		
	Customer Orderable	Specifies whether an item is orderable by external customers. You can initially define an item with Customer Orderable selected and Customer Orders Enabled de-selected. This means prices can be defined for the item, but no orders can be placed for it.

Table 2–7 Service Template Inventory Attributes

Section	Check Box/LOV	Description
	Customer Order Enabled	Specifies whether an item is currently customer orderable.
	Internal Orderable	Specifies whether to allow the item to be ordered on an internal requisition.
	Internal Order Enabled	Specifies whether you can currently order the item internally.
	Activation Required	Turn this attribute on if customer is required to activate the Product; this option is generally used for communication products.
	Assemble to Order	Select this if the item is generally built for sales order demand.
	OE Transactable	Specifies whether the demand and shipment for the item is tracked.
Invoiceable		
	Invoiceable	Specifies whether the item can be included on an Oracle Receivables invoice.
	Invoiced Enabled	Indicate whether to activate an item for invoicing in Oracle Receivables. If Invoiceable Item is turned on, you can temporarily exclude from invoicing by leaving Invoice Enabled turned off. If you turn this option on, the item appears in the Invoice Entry item list of values in Oracle Receivables. If you turn this feature off, the item does not appear in the list of values and Auto Invoice rejects the item.
Service		
	Defect Tracking	Specifies whether defects related to the item should be tracked.
	Install Base	Specifies whether the item is Oracle Install Base trackable.
	Contract Item Type	Indicates the contract item type.
	Coverage Template	Specifies the coverage template type for a warranty.
	Duration Value	Specifies the current service duration
	Duration Period	Specifies the unit of time for the service.

Table 2–7 Service Template Inventory Attributes

Section	Check Box/LOV	Description
Web		
	Orderable on Web	Specifies whether this item can be orderable on Oracle iStore.
	Web Status	Specifies whether the item is to be published to a Web store.

2.1.7 Understanding Offers

Topics in this section include:

- [Section 2.1.7.1, "Offers Overview"](#)
- [Section 2.1.7.2, "Offer Types"](#)

2.1.7.1 Offers Overview

An offer is an incentive designed to entice someone to purchase your product or service. It can take several different forms depending on who your target audience is and what you want the offer to accomplish. Offers functionality is available in both Oracle Marketing and Trade Management, to facilitate the creation and execution of offers aimed at both consumers and the trade.

Offers may be created and attached to Campaigns or to Products. They may also be created to stand alone. Offers come in many different varieties which are used for specific promotion types. For example,

- Buy a Children's Combo Meal and receive a cartoon character figurine
- Buy 2 get 1 free
- Purchase a DVD player and receive a free DVD

All of these take the form of delivering a free product when another product is purchased. Discounted offer examples include:

- Today Only! 25% Off Original Price
- Buy \$100 worth of items and receive 20% off the entire order

2.1.7.2 Offer Types

The different forms that offers can take are reflected in the different offer types that are seeded in the application. The following table lists and describes offer types found in Oracle Marketing.

Table 2–8 Oracle Marketing Offer Types

Offer Type	Description	Example
Off Invoice	Amount or % discounted from an invoice	Buy a specified quantity and receive a % discount off the purchase
Order Value	Discount based on the entire amount of the order	Spend \$100 and receive 10% discount off the purchase.
Promotional Goods	Purchase a good or service and receive an additional good or service at no charge	Purchase a DVD player and receive 10 free DVD Rentals.
Accrual	Incentive offered to a reseller or distributor based on cumulative purchases made over a specific time period	For all purchases made for the year a retailer may receive 5% Marketing Development Funds from the manufacturer Note: Accrual offers may be used in both Oracle Marketing and in Trade Management.

2.1.8 Understanding Budgets

Topics in this section include:

- [Section 2.1.8.1, "Budgets Overview"](#)
- [Section 2.1.8.2, "Budget Planning"](#)
- [Section 2.1.8.3, "Budget Execution"](#)
- [Section 2.1.8.4, "Budget Tracking"](#)
- [Section 2.1.8.5, "Budget Administration"](#)

2.1.8.1 Budgets Overview

Budgets in Oracle Marketing are the funding source for a variety of objects. These objects, such as campaigns and events, may require other approvals before a funding request may be made. Budgets may exist in a hierarchical structure, a root budget supplying funds to child budgets, allowing managers to view and control

their costs. Budget checkbooks have columns for: Total (original amount), Holdback, Planned, Committed, Balance (Total – Holdback – Committed), Utilized and Balance, giving managers a clear view of utilized and available funds. Oracle Marketing's budgeting functionalities are grouped in the following categories:

- Budget Planning
- Budget Execution
- Budget Tracking
- Budget Administration

2.1.8.2 Budget Planning

Topics in this section include:

- [Section 2.1.8.2.1, "Fixed Budget"](#)
- [Section 2.1.8.2.2, "Market Eligibility"](#)
- [Section 2.1.8.2.3, "Product Eligibility"](#)

2.1.8.2.1 Fixed Budget A fixed budget is a pool of money, with value > zero, decided up front to fund sales, marketing and partnering activities. Fixed budgets can be defined for different customer and product attributes.

Multiple marketing objects request money from fixed budgets including but not limited to the following:

- Campaign
- Campaign Schedules
- Event
- Event Schedules

Here is an example of how a campaign updates the budget:

A fixed budget is set up for all sales and marketing activities for customers in the United States for \$500,000. A campaign is created for \$10,000. When it becomes active, the budget has the following balances:

Total	Committed	Utilized	Paid
500,000	10,000	0	0

This is an advertising campaign, and a marketing manager contacts an advertising agency. The agency runs the ads for the company and charges the company \$8,000. The marketing manager enters this \$8,000 as an actual cost for the campaign. The budget balances become:

Total	Committed	Utilized	Paid
500,000	10,000	8,000	8,000

2.1.8.2.2 Market Eligibility Market eligibility defines what customers or customer groups the budget is targeting. For a fixed budget, market eligibility serves two purposes:

- Classification
- Validation (there is an option to validate that the activity of a campaign or event matches that of the budget category’s).

Eligibility for a fixed budget can be defined for the following:

- Individual customers
Individual customers can be eligible whether they are sold-to, bill-to, or ship-to customers. These are customer “accounts” in Oracle’s Trading Architecture Community (TCA).
- Buying Groups
Buying Groups are organizations formed when companies group themselves together to leverage on higher purchase volume achieved as a group.
- Lists
Lists are groupings of customers or customer contacts created based on user-specified criteria. The criteria can be specified using Oracle Discoverer workbooks or queries.
- Segments
Segments are also groupings of customers or customer contacts. Like lists, they are also created based on user-specified criteria via Discoverer workbooks or writing queries.
- Territories
Territories are yet another way to group customers together. They are created in the Oracle E-Business Suite Territory Management module.

2.1.8.2.3 Product Eligibility Product eligibility defines what product or product families or groups the budget is targeting. For a fixed budget, product eligibility mainly serves the purpose of classification.

Eligibility for a fixed budget can be defined for the following:

- Product - These are items from the Inventory system.
- Product Category - “Category Sets” contain categories. Categories contain products. In fixed budgets, users can specify any category set and category.

2.1.8.3 Budget Execution

Topics in this section include:

- [Section 2.1.8.3.1, "Budget Request"](#)
- [Section 2.1.8.3.2, "Budget Transfer"](#)
- [Section 2.1.8.3.3, "Budget Reconciliation"](#)

2.1.8.3.1 Budget Request A budget request is a request to withdraw money from a budget. A budget request may be submitted by a sales rep who wants to give an offer to his customers. A budget request may also be submitted by the owner of another budget. Requests generally need to get approval before money actually gets transferred. Approval rules can be configured to route different requests to different approvers.

A budget may provide funding for multiple marketing activities, and vice versa, an activity such as campaign can get money from multiple budgets.

2.1.8.3.2 Budget Transfer While a request is asking for money from another budget, a transfer is moving money to another budget. In any case, all movements of money in and out of any given budget are tracked to provide full audit control.

For example, a “New Product Introduction” fund may not need as much money as originally forecasted because the new product was not performing well. A budget user can then transfer money out of it into other budgets so that the money can be spent somewhere else.

2.1.8.3.3 Budget Reconciliation Reconciliation is a way to return the following money at the end of a marketing activity. It adjusts previously committed, but un-utilized funds, transferring them from the Committed column to the Available column (“Reconcile Un-Utilized”). This functionality can be used when a marketing activity has completed or when the activity has been cancelled.

The Reconcile button will only appear if the campaign’s end date has been reached and status is completed, or if the campaign has no end date its status should be completed. You can view all reconciliations in drill-down details. Reconciliation can also be performed automatically based on a concurrent process which takes into account a pre-defined grace period.

2.1.8.4 Budget Tracking

Topics in this section include:

- [Section 2.1.8.4.1, "Buckets"](#)
- [Section 2.1.8.4.2, "Campaign Checkbook"](#)
- [Section 2.1.8.4.3, "Rollup View"](#)

2.1.8.4.1 Buckets The following table describes the multiple buckets used to track different Budget amounts.

Table 2–9 Budget Buckets

Column	Meaning
Total	Total budget amount
Transferred In	Amount transferred into the budget. This is added to the Total.
Transferred Out	Amount transferred out to another budget. This is subtracted from the Total.
Holdback	Amount held in reserve.
Available	Total – Holdback
Planned	Total amount of not yet approved budget requests.
Committed	Total amount of all approved budget requests.
Balance	Available – Committed
Utilized	Amount that has been utilized.
Paid	Amount that has been paid.

2.1.8.4.2 Campaign Checkbook The campaign checkbook summarizes the main budget buckets by campaign. Users can get to a campaign checkbook by drilling down into Planned, Committed, Utilized and Earned, and then again drilling down into the campaign itself.

2.1.8.4.3 Rollup View Budget rollup view is very simply this—for each budget, display not simply the amounts for itself, but a sum of (its own numbers + all numbers of its descendent budget.)

For example,

If there is a budget hierarchy where there are 3 levels, each level with one node, like USA-Western Region-California, then the roll-up view of USA will be the numbers for USA+Western Region+California.

So if the California budget has committed \$10,000, the Western Region budget on its own has committed \$5,000, the USA budget on its own has committed \$3,000, then the roll-up view for the USA budget's committed funds is $\$10,000 + \$5,000 + \$3,000 = \$18,000$.

The Roll-up view of the Western Region budget's committed funds is $\$10,000 + \$5,000 = \$15,000$.

The Roll-up view of the California budget's committed funds is \$10,000.

A budget self view means that it will only show the transactions/activities that the budget itself directly funds. In the above example, the budget self view for the California budget's committed is the same as its roll-up view (i.e., it equals \$10,000). The budget self view for the Western Region budget's committed is \$5,000. The budget self view for the USA budget's committed is \$3,000.

Each user in a budget hierarchy can see a real time, rollup view based on his user profile currency. For example, a manager in Canada sees the rollup view, he may prefer seeing it in CAD. His budget's parent is owned by a US manager who prefers to see the rollup view in USD. Each manager will be able to see the rollup view in the currency he prefers.

2.1.8.5 Budget Administration

Topics in this section include:

- [Section 2.1.8.5.1, "System Parameters"](#)
- [Section 2.1.8.5.2, "Custom Setup"](#)
- [Section 2.1.8.5.3, "Mandatory Rules"](#)
- [Section 2.1.8.5.4, "Locking Rules"](#)
- [Section 2.1.8.5.5, "System Status"](#)
- [Section 2.1.8.5.6, "User Status"](#)

- [Section 2.1.8.5.7, "Approval Rule"](#)
- [Section 2.1.8.5.8, "Budget Security"](#)
- [Section 2.1.8.5.9, "Budget Categories"](#)
- [Section 2.1.8.5.10, "Budget Thresholds"](#)
- [Section 2.1.8.5.11, "Budget Delete"](#)
- [Section 2.1.8.5.12, "Copy Budget"](#)

2.1.8.5.1 System Parameters For Oracle Marketing budgets, System Parameters define the Set of Books setup. When a user creates a budget in Oracle Marketing, he can define it in any currency. In the background, however, a “functional currency” will always be recorded with the budget. A “functional currency” is the main currency used by a Set of Books.

2.1.8.5.2 Custom Setup Custom Setups generally serve a few purposes: defining the prefix for the source code or number (a unique identifier for an object), determining the side navigation links displayed, as well as determining whether an object requires approval.

For a budget, however, the last function does not apply since a budget almost always requires approval. The only time when a budget does not require approval is when the one and only approver according to approval rule setups is actually the budget owner himself.

2.1.8.5.3 Mandatory Rules Mandatory Rules are a way for companies to control data entry by mandating that certain fields must always be entered on screen by users. In addition to data mandated by the system, mandatory rules can be created to make other data fields mandatory.

For example, “business unit” in budget is not a system mandatory field. Ordinarily users have a choice to select value for it or not. If management wants to ensure that users always select value for this, so that perhaps budgets can be properly classified, or so that proper reports can be run for budgets, a mandatory rule may be created for “business unit.”

2.1.8.5.4 Locking Rules Locking Rules are another way for companies to control data entry by disallowing updates to certain data at certain statuses, i.e., locking data.

By design, locking rules are ignored for the Oracle Marketing Super User responsibility. Whenever a user is logged in as Oracle Marketing Super User, the fields which are supposed to be locked using locking rules cannot be modified. If

the user is not logged in as the Oracle Marketing Super User, then the fields are locked based on locking rules.

2.1.8.5.5 System Status A budget goes through the following main system statuses:

- Draft: Budget amounts are entered but not approved.
- Pending Approval: The budget is being reviewed and needs approval to become active.
- Active: The budget 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 describes budget statuses used in Oracle Marketing.

Table 2–10 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.

Table 2–10 Budget Statuses

Status	Description
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.

2.1.8.5.6 User Status There are “system” statuses that drive certain behavior of an object. And then there are “user” statuses that can be created on top of system statuses. User statuses do not drive behavior, but can be used for the purpose of classification.

For example:

A team of finance people administers a budget. They all need to review the setups of a budget before actually submitting it for approval, so there may be multiple user statuses created:

System Status	User Status
Draft Draft	First Reviewer
Draft Draft	Second Reviewer
Draft Draft	Third Reviewer
Draft Draft	Final Reviewer

The first reviewer logs in to the system, finds the budget, puts it in “Draft – First Reviewer” status. At this user status, since the underlying system status is Draft, the budget has all the behavior of a draft budget—all the fields can be updated, funds cannot not yet be withdrawn, etc. But putting the budget in this user status can serve the purpose of letting everyone know that the budget is under the first review. When this first reviewer finishes, he may then change the status to “Draft —Second Reviewer” which serves the purpose of letting everyone know that he has finished with reviewing the budget.

2.1.8.5.7 Approval Rule Wherever approvals are required, approval rules can be created to determine who gets to approval what under what circumstances.

2.1.8.5.8 Budget Security Not every user can, or should be able to, update or view a budget. The table below explains the different access levels for budgets.

Table 2–11 Budget Access Privileges by User

User	Budget Access Privileges
AMS: Admin Group	Update all fields. ■ Excluding those locked by system ■ Including those locked by locking rules
Owner	Update all fields. ■ Including Owner field ■ Including adding Team members ■ Excluding those locked by system ■ Excluding those locked by locking rules
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
Team members without Edit Metrics	View budget only
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. But 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 he does fall into one of the above access levels, he can update all fields including those locked by locking rules.

For example, user John is an owner of Budget A does not have the “Oracle Marketing Super User” responsibility but some other marketing responsibility.

User Mary has the “Oracle Marketing Super User” responsibility and is a team member with edit metrics 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, because she has the super user responsibility.

2.1.8.5.9 Budget Categories Budget Categories serve two broad purposes for Oracle Marketing:

- **Classification**

They are configurable ways to classify a budget. A category can be for any sales, marketing or partnering purpose. For example, a budget category can be created for “Advertising Funds,” “Partner Marketing Funds,” etc. Categories can be arranged in hierarchies. For example, a “Marketing” budget category may have multiple sub-categories such as “Partner Marketing,” and “New Product Introduction.”

- **Approval Rules**

They can be used to drive both “root budget approval” rules as well as “budget approval” rules. Root budget approval rules determine who will be responsible for approving a budget itself. Budget approval rules, on the other hand, are used to access who will be responsible for approval an offer, a campaign, an event, or any object’s request to get money from a budget.

2.1.8.5.10 Budget Thresholds Threshold alerts are designed to help users monitor their budgets’ activities. They let companies set different rules to send out alert notifications to inform users of fund usage and depletion at various levels. 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 or allow companies to react to market demand faster.

For example, if a budget lasts for the whole year, a budget user may want to be alerted if, after the first quarter, budget’s actual utilization is > 25% of the committed amount. After the second quarter, he may want to alerted if utilization is > 50% of the committed amount. So on and so forth. A threshold may be created with the name “Quarterly Budget Alert for 2003” and with 4 lines one for each quarter, each with a different condition and frequency by which the notifications will be sent.

2.1.8.5.11 Budget Delete Budgets at some statuses can be deleted. This is a “soft delete.” Once deleted, users will not be able to search and find the budget from the user interface. The following statuses are the ones for which budget delete is possible.

- Draft
- Cancelled
- Archived

2.1.8.5.12 Copy Budget This allows users to create a new budget by copying information from an old budget. An example may be a yearly budget that repeats the same essential information each year.

2.1.9 Understanding Approvals

Topics in this section include:

- [Section 2.1.9.1, "Approvals Overview"](#)
- [Section 2.1.9.2, "Approval Requests"](#)
- [Section 2.1.9.3, "Previewing Approvals"](#)
- [Section 2.1.9.5, "Approvals Rule Search"](#)
- [Section 2.1.9.6, "Approval Notes"](#)

2.1.9.1 Approvals Overview

Campaigns and events are approved according to business rules contained in Oracle Workflow. These business rules are designed to reflect the organization's approval process. Oracle Marketing comes with a predefined workflow that automatically sends campaigns and events for approval by a designated approver when a campaign or event is created.

There are two types of approvals: theme approval and budget approval. The organization's application administrators for Oracle Marketing will enable the approval workflows during the implementation process.

Theme Approval

Theme approval is synonymous with concept approval. When a marketing event or campaign is being planned, there is an idea which is conceived. Once the idea is conceived, the idea is approved (e.g., during the Christmas season, a fashion show is planned in major cities by an clothing manufacturer).

Only a brief detail of the cost to be incurred and the expected return is provided at this stage. The idea is then approved. This means that the theme/concept of having a set of fashion shows is approved.

Budget Approval

Once the theme has been approved, a detailed plan is built based on the number of venues and all the costs involved. Within Oracle Marketing, a schedule is created with a city and details like the location for each of the cities in which the fashion

show is intended to be held. In order to execute this plan of having fashion shows in major cities, funds will be required.

The schedule owners or team members would then request funds to execute these schedules. The budgets need to be approved by the responsible persons for the budget. This is the process of budget approval.

If the budget approval is rejected, this would mean that although the concept for the fashion show was good, the clothing manufacturer may not proceed due to budget constraints or other reasons like ROI not being as expected.

2.1.9.2 Approval Requests

Approval requests get processed through the Request Approval button. The button is rendered on the details page if the object needs approval. Campaign Schedules, for example, do not require theme approval so the Request Approval button is not displayed on its details page.

This approval need not be the workflow approval only; it also includes cases where the object can go from 'New' to 'Active' directly bypassing the approval details page. The Request Approvals button is rendered as a "View Approvals" button on the details page if the object has been submitted for approval.

Only those user who have the "edit metrics" access can request approval. This means that the Request Approval and the View Approval button will not be available to users who do not have the "edit metrics" privilege.

2.1.9.3 Previewing Approvals

When you click on the Request Approvals button, you are taken to the preview approvals page. The preview approvals page is divided to give information on the object for which the approval request is being made: Object Name, Object Status, Approval Type, Object Owner, Approval Requestor and Approval Rule Applied. The page also includes Approver Details associated with the approval rule: i.e., Approver Order, Approval Type, Approval Name, Status.

2.1.9.4 Viewing Approvals

Clicking on the View Approvals button will take you to the View Approvals page where a user can see the last approval process initiated for the object. This can be either be Theme or Budget. For Budget Lines, a 'Details' icon in the Budget Line replaces this button. This icon leads to the Preview Approvals page from the individual budget lines.

2.1.9.5 Approvals Rule Search

Approval rules are built on a set of criteria. The approvals search functionality allows users to search for previously built approval rules. This section is in the Administration tab and helps in identifying the existing rules. Based on a set of criteria, the approval search provides the set of existing rules that could apply to the object.

2.1.9.6 Approval Notes

As approvers approve objects in an approval hierarchy, there are a set of approval notes that the approvers can enter. These notes are visible to users with appropriate security to the objects. Notes can be accessed via the View Approval Details page. This page contains details on the approval notes that have been created in workflow.

The ability to view approval notes is provided for the budget lines at all times. Approval notes are notes written by the budget line and budget approvers. The note could contain information regarding the object details or the reason for rejection.

Note: The contents of approval notes are visible to users with edit metrics. The content of the notes is not a 1-1 communication between approver and requestor or approvers within a hierarchy.

2.1.10 Understanding Deliverables and Messages

Topics in this section include:

- [Section 2.1.10.1, "Deliverables and Messages Overview"](#)
- [Section 2.1.10.2, "Deliverable Usages"](#)

2.1.10.1 Deliverables and Messages Overview

Deliverables are marketing collateral that you can distribute to customers across multiple channels. Each deliverable object represents hard or soft collateral which is associated with a campaign or an event. Examples can include:

- Creating a brochure for an event
- Advertising in a magazine for a promotional campaign
- Creating a data sheet for a product launch campaign

- Promoting brand loyalty, special offers, product messages, and events

Messages are associated with products or products suites, and can be used by the campaigns and events which promote those products. Examples of messages include corporate and offering slogans, positioning statements, other key branding marketing strategies, logos, style sheets, creative guidelines, templates, and so on. You can use these across one or more deliverables.

A message is similar to any other deliverable, except that it must be set to Active to be associated with a campaign or event. A message type assigns the message to the product level, product suite-level, or organization level.

Deliverables that Use Budgets

The user begins the workflow process by setting the deliverable to Budget Approval. This initiates the budget approval workflow. The status is changed to Pending Budget Approval. The budget approver approves the total budget for the deliverable via a workflow notification.

If the budget is approved, the user can activate the deliverable by setting status to Final Loaded. This initiates the concept (theme) approval process. The status is changed to Pending Approval. The concept approver approves the entire deliverable item via a workflow notification. If there is no response within a certain time frame, the request will be submitted to an alternate contact.

If approved, the status is changed to Final Loaded. The deliverable is now available for fulfillment and approved usage across campaigns and events.

If a budget is used and is not approved, the budget workflow process is initiated by the system before the deliverable is submitted for concept approval. The budget must be approved before the deliverable can be approved.

Deliverables that Do Not Use Budgets

The user begins the workflow process by setting the deliverable to Final Loaded. This initiates the concept (theme) approval process. The status is changed to Pending Approval. The concept approver approves the entire deliverable item via a workflow notification. If there is no response within a certain time frame, the request will be submitted to an alternate contact.

If approved, the status is changed to Final Loaded. The deliverable is now available for fulfillment and approved usage across campaigns and events.

When a deliverable reaches the end date, the deliverable is set to expired. An expired deliverable cannot be used or fulfilled, but can be accessed and referenced.

A user can archive a deliverable when it is no longer needed. An archived deliverable is no longer accessible and cannot be used.

A deliverable can be canceled at any time. A canceled deliverable is no longer accessible and cannot be used. Note that campaigns or events which use archived or canceled deliverables get notification of the status change.

2.1.10.2 Deliverable Usages

The Usages side navigation link provides information on where a deliverable is being used within Oracle Marketing. The user interface exposes the name, quantity, date needed by, and owner of the deliverable.

2.1.11 Understanding Scripting/Survey Integration

Topics in this section include:

- [Section 2.1.11.1, "Oracle Marketing/Oracle Scripting Integration Overview"](#)
- [Section 2.1.11.2, "Scripting Integration Process Flow"](#)
- [Section 2.1.11.3, "Seeded Scripts"](#)

2.1.11.1 Oracle Marketing/Oracle Scripting Integration Overview

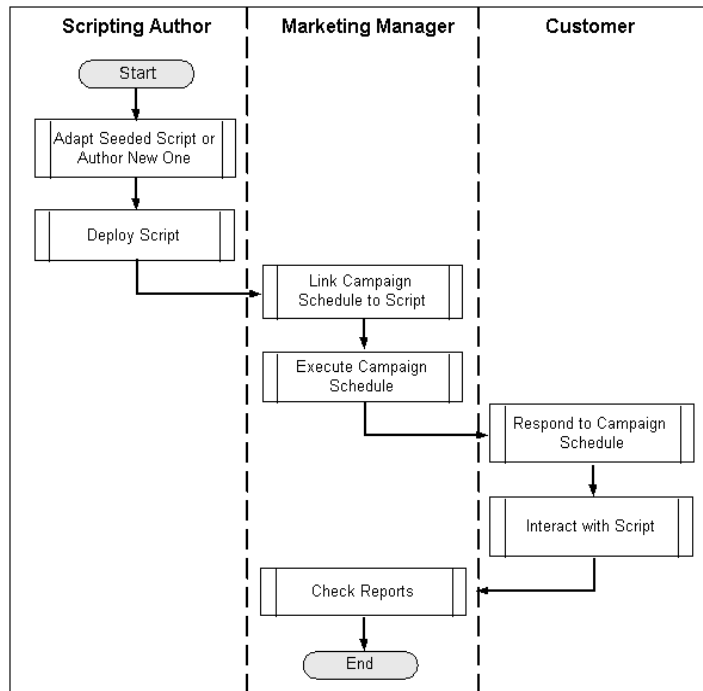
The goal of the integration between Oracle Marketing and Oracle Scripting is to provide marketing managers with the ability to follow-up on the campaigns they design with a scripted flow of interactions (either through the Web or a call-center).

One of the resulting benefits is to enable marketers to automate and streamline some marketing-specific activities like event registration or lead creation.

As another benefit, the branching functionality of Oracle Scripting enables marketing organizations to react differently to the input of different customers based on their profile or on the answers they provide to questions, and thus to develop a personalized relationship with customers.

2.1.11.2 Scripting Integration Process Flow

The following diagram illustrates the Oracle Marketing/Oracle Scripting integration flow.



The high-level process flow is as follows:

1. A script is created in Oracle Scripting.
2. The Script is deployed in Oracle Scripting.
3. The marketer links a campaign schedule to the script (using click-through destinations for Web scripts).
4. Customers responding to the schedule are taken through the script, the customers' answers are collected, and the potential action (event registration, lead creation) is executed.
5. Marketer can check the schedule dashboard for a report on the results of the schedule.

2.1.11.3 Seeded Scripts

Oracle Marketing comes with seeded scripts that focus on the following marketing-specific activities:

- Event Registration
- Lead Creation
- Customer Data Acquisition

These seeded scripts are intended to be usable with minimum configuration and to be deployed as either call center scripts or Web scripts. Some components or building blocks are also seeded to allow customer identification and customer authentication. See the *Oracle Marketing Implementation Guide* for more information.

2.1.12 Understanding Click-Through Destinations

Topics in this section include:

- [Section 2.1.12.1, "Click-Through Destinations Overview"](#)
- [Section 2.1.12.2, "Seeded Click-Through Actions"](#)
- [Section 2.1.12.3, "Tracking Click-Through Destinations"](#)

2.1.12.1 Click-Through Destinations Overview

When creating electronic content—whether it is an e-mail blast or a Web advertisement banner—the marketing content author may need at some point to insert a URL that will send the customer or prospect who will receive this piece of content to a destination.

This URL can be very simple, like the home page of a web site, or it can be a bit more complex. For example, the content author may want to send the customer/prospect to the registration page of Oracle iStore or to have the URL add a product to an iStore shopping cart. Adding a product to a shopping cart is a typical example of a structured URL containing some parameters. However, most marketers cannot be expected to know parameters like the `item_id` of a product.

Click-Through Destinations (CTDs) allows marketers to generate simple and structured URLs for content while hiding the complexity of the URL. By providing an interface for creating structured URLs for content, a marketer doesn't have to know all URL parameters to create a destination for that content.

There are already 3 ways of creating URLs for CTDs in Oracle Marketing:

E-mail Content: A CTD can be created for a campaign schedule of type “direct marketing - e-mail.” 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 eMerchandising 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 webstore. When a user visits the homepage of the webstore they will see the image, if they choose to click on the image, they will automatically be routed to the specified destination page.

Web Offers: 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 action “Go to iStore Shopping Cart with an Item,” in this example the “action” associated content can be the image selected. Ultimately, the user visits the homepage of the webstore, 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.

2.1.12.2 Seeded Click-Through Actions

When creating a CTD a critical component of it is the “action” selected. 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 table describes the seeded actions for CTDs.

Table 2–12 Seeded Click-through Destination Actions

Action	Description
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 the shopping cart page. This action is available only if Oracle iStore is implemented.

Table 2–12 Seeded Click-through Destination Actions

Action	Description
Go to Product Details page in iStore	Uses deep linking to directly forward the user to a specific Oracle iStore product detail page. When using this functionality, the AMS : Item Validation Organization profile option 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 Oracle 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 Oracle 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 Oracle iStore is implemented.
Go to iStore Registration Page	Uses deep linking to forward the user to the Oracle iStore registration page. This action is available only if Oracle iStore is implemented.
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," then the user will be forwarded to the English homepage for that storefront. This action is available only if Oracle 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 and 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 the <i>Oracle Marketing Implementation Guide</i> .

2.1.12.3 Tracking Click-Through Destinations

Another important feature of click-through destinations is the tracking capability. When you create a CTD, you can mark it as trackable, so that the responses to the campaign schedule that includes the CTD can be tracked in Interaction History and reported via the campaign schedule dashboard. To implement tracking for CTDs see the *Oracle Marketing Implementation Guide*.

2.1.13 Understanding Metrics, Costs and Revenues

Topics in this section include:

- [Section 2.1.13.1, "Metrics Overview"](#)
- [Section 2.1.13.2, "Metric Categories"](#)
- [Section 2.1.13.3, "Metric Hierarchies"](#)
- [Section 2.1.13.4, "Metric Calculation Types"](#)
- [Section 2.1.13.5, "Metrics Refresh Process"](#)
- [Section 2.1.13.6, "Metric Templates"](#)
- [Section 2.1.13.7, "Seeded Metrics"](#)
- [Section 2.1.13.8, "User-Defined Metrics"](#)
- [Section 2.1.13.9, "Metrics and Campaign Triggers"](#)

2.1.13.1 Metrics Overview

Metrics are measurements 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 manually input or automatically calculated by the Oracle Marketing application.

Metrics can also be used to initiate Campaign Triggers. For example, a Responses Count metric that attains a desired value could be used to trigger a follow-up Campaign Schedule to a larger audience.

Metrics are organized into two classifications: general metrics, and cost and revenue metrics. General metrics include the number of responses to a campaign and the number of registrants for an event. Cost and revenue metrics are used to track expenses and income associated with marketing activities. Each of these metric classifications is presented in its own screen: the “Costs and Revenues” screen for cost and revenue metrics, and the “Metrics” screen for general metrics.

A number of commonly used marketing metrics are included with the deployment of the Oracle Marketing application. If new metrics need to be defined for your organization, the Marketing Administrator must create and set up these additional metrics. For more information on creating and setting up metrics, see the *Oracle Marketing Implementation Guide*.

2.1.13.2 Metric Categories

Metrics can be grouped into logical categories. For example, all metrics used to track expenses for marketing activities are grouped into the Cost category. Several metric categories, including Cost, Revenue, Response, and Other are included with the deployment of the Oracle Marketing application. Your Marketing Administrator can create additional metric categories as you increase number of metrics you are tracking. Refer to the *Oracle Marketing Implementation Guide* for more information about metric categories.

2.1.13.3 Metric Hierarchies

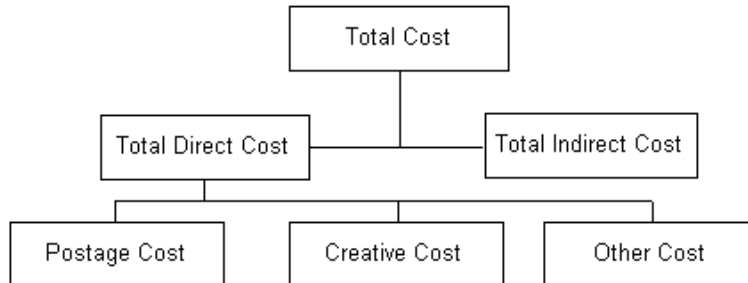
Metrics are organized into two hierarchies:

- A Summary Hierarchy within a marketing object
- A Rollup Hierarchy between marketing objects

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:

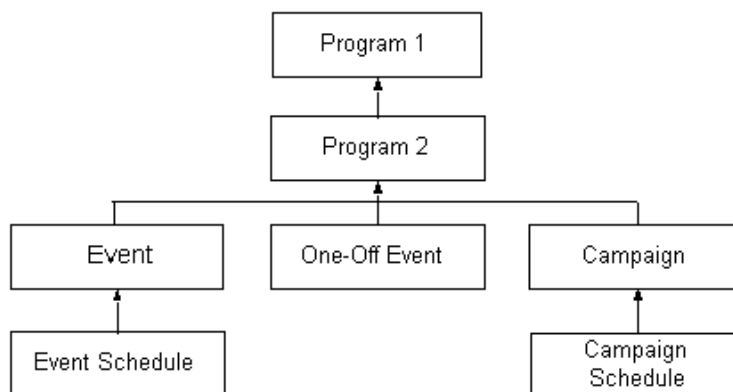


In this example, Postage, Creative and Other Costs at the lowest level are summarized to Total Direct Cost, which is then added to Total Indirect Cost (e.g., overhead expenses) to obtain Total Cost for the Campaign Schedule.

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 diagram shows the typical structure for a 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.

2.1.13.4 Metric Calculation Types

The metric calculation type determines the way in which forecast and actual values for a metric are entered into the system. Metric calculation types include: Manual, Function, Summary, and Rollup.

Manual

Manual metrics receive both forecast and actual values from user input.

Function

Function metrics receive their 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. For example, the seeded function metric for Responses Count determines the total number of campaign response records within the Interaction History table based on campaign source code.

The forecast values for function metrics are entered manually into the system.

Summary

Summary metrics receive both forecast and actual values from lower level metrics in the summary hierarchy. Summary metrics may have subordinate metrics of any type (summary, manual, rollup or function) within the same metric category (Cost, Revenue, Response, etc.).

Summary metrics are automatically associated with a marketing object when any subordinate metric is associated. For example, a Total Direct Cost summary metric is available for Campaign Schedules. If you associate Postage Cost with a particular campaign schedule, Total Direct Cost will also be associated with the object, since Postage Cost is a subordinate metric of Total Direct Cost.

Rollup

Rollup metrics 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). In addition, all child metrics of a rollup metric must be in the same metric category (Cost, Revenue, Response, etc.).

In contrast to summary metric values, which are calculated within the same marketing object, rollup metric values are calculated across marketing objects.

2.1.13.5 Metrics Refresh Process

The metrics refresh process runs on a periodic basis defined by the Marketing Administrator. For example, the process could be set up to run each night at midnight. During the metrics refresh process, the following actions occur:

- Actual values for all function metrics are refreshed based on information from the Oracle E-Business Suite. For example, the actual value of the seeded function metric for Responses Count is refreshed based on the total number of campaign response records within the Interaction History table for each campaign source code.
- Forecast and actual values for all summary metrics are refreshed based on their subordinate metrics in the summary hierarchies.
- Forecast and actual values for all rollup metrics are refreshed based on their child metrics in the rollup hierarchies.
- If the optional “Update History” parameter is enabled, the previous period's metric values are copied to the Metrics History table to allow for historical analysis.

To set up or change the frequency of the metrics refresh process, refer to the *Oracle Marketing Implementation Guide*.

2.1.13.6 Metric Templates

Metric Templates enable an organization to standardize the metrics to be associated with a marketing activity upon the creation of the activity. For example, when a user creates a campaign schedule, all metrics within metric templates defined for campaign schedules are automatically associated to the new campaign schedule. See the *Oracle Marketing Implementation Guide* for more information on creating and using metric templates.

2.1.13.7 Seeded Metrics

A number of commonly used marketing metrics, such as Total Cost, Total Revenue, Responses Count, and Event Registrants are included with the deployment of the Oracle Marketing application. Refer to the *Oracle Marketing Implementation Guide* for a complete list of seeded metrics.

2.1.13.8 User-Defined Metrics

In addition to the seeded metrics, user-defined metrics can be used for measuring marketing objects. Refer to the *Oracle Marketing Implementation Guide* for details on defining user-defined Metrics.

2.1.13.9 Metrics and Campaign Triggers

Metrics can be used to initiate campaign triggers when the specified condition is met. Within a trigger, a condition is defined in which a metric value is compared to a user-defined value, to another metric value, or to an Oracle Discoverer workbook that generates a single value. The campaign trigger can then be associated with a campaign schedule. When the specified trigger condition is met, the campaign schedule is activated.

The process flow is as follows:

1. Create the Campaign Schedule.
2. Define attributes for the Campaign Schedule.
3. Define the Campaign Trigger.
4. Associate the Trigger to Campaign Schedule.
5. The system monitors the Trigger condition.
6. The system activates the Campaign Schedule if and when the Trigger condition is met.

See [Section 2.2.18, "Working with Triggers"](#) for more information on triggers.

2.1.14 Understanding Marketing Intelligence

Topics in this section include:

- [Section 2.1.14.1, "Marketing Intelligence Overview"](#)

2.1.14.1 Marketing Intelligence Overview

Oracle Marketing's marketing intelligence is displayed as Home page bins, reports, and charts that provide summary information about key marketing activities, along with links to recently accessed campaigns and events.

Most Recent Bins

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

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

Reports displayed directly on the Home page 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

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.

See [Appendix B, "Home Page Bin, Report, and Chart Reference"](#) for more information.

2.1.15 Understanding the Marketing Calendar

The Marketing Calendar provides administrative users of marketing organization with the ability to push out execution objects and their details to all marketing users through the calendar functionality. These objects can be exposed based on a selection criteria or by picking up independent objects to be displayed.

The marketing calendar is set up at the administrator level. This means that the administration user decides the set of objects that will be displayed on the calendars of every user within the organization. Individual users can, however, decide that they do not wish to view any of the marketing objects that have been set up by the administrators. This is done through the use of user profiles.

2.1.16 Understanding User Profiles

Oracle Marketing has some attributes that the user may modify. The profile link in the upper right corner of the page displays a profile page where items such as passwords, number of database rows displayed, default currency and other attributes.

Access to many of the tabs is controlled by a responsibility. Each user is given a responsibility which determines what tabs are displayed and what rights a user may have.

The ability to modify user profiles is provided for the convenience of each user and is based on their individual preferences. Changes made by individual users in their user profiles do not affect the functionality of the application.

2.1.17 Understanding Notes

In various business transactions, such as service requests, customer orders, sales, and marketing transactions, an agent or customer support representative needs to record information about the transactions performed. A note is a record of descriptive information that has been generated by users and can be referenced. Notes can be used from different applications in the Oracle E-Business Suite.

Notes are displayed with their type, text, author and date. Notes become a permanent part of the object. You can only view notes that are not specified as private. A note can also have one to multiple attachments. As a default, all notes created by a resource appear in the Notes Summary window.

The following are key features of notes:

- You can capture large amounts of data, such as log files and text
- Notes can be translated to other languages
- Notes can be private or public
- Note types are available to categorize business transactions such as searching for a note
- You can attach documents (like a presentation) to a note
- The Detailed Note window holds text notes up to 32K in size
- Further refine your note search by entering Related To information in the Find Notes window. Selecting a match option also helps you narrow your search.

All of the Oracle E-Business Suite writes to the same Notes table, which can be accessed through the Forms or HTML interface. Although users can use notes

through Forms or HTML, set up for both is still in Forms and can be accessed through the CRM Administrator responsibility.

2.1.18 About Attachments

Attachments are physical documents, URLs, or text. The typical use of attachments is for sharing and storing information about marketing activities. For example, you can attach a press release about an event. While the attachments are uploaded to a marketing object, they can be accessed and downloaded by all team members associated with the marketing activity.

2.1.19 Understanding Tasks

A task is the lowest unit of work. For example, a task can be a follow-up action or a daily work assignment. In another example, a support manager of a company may want to create a task for an employee stating, "Please call back customer by 9:00am." This task details that the employee needs to call back the customer.

A task includes information relating to actions such as resources, appointments, references, dates, contacts, recurrences, and events. You must assign a task to an individual or object. For example, once the support manager has created the task to call back the customer, he can:

- Assign a specific resource to perform the task
- Reference source documentation such as a service request
- Establish new tasks to reoccur during a specific interval such as every day

2.1.20 Understanding Teams

Marketing teams associated with marketing objects (Campaigns, Events, Deliverables, etc.) represent users or a group of users with access privileges to these objects. Marketing team members can have full access (read/write) either with or without the ability to Edit Metrics (Budgets, Costs & Revenues and Metrics) for the marketing object. By default, the owner of a marketing object has full access (with the option to Edit Metrics) to the marketing object. If a user is associated to a marketing team with the Edit Metrics option unchecked, then this user will not see the associated Budgets, Costs and Revenues or Metrics side navigation links for this object.

Users that are not on a marketing team have a read-only view of the marketing object. This view provides limited information about the corresponding marketing object.

Marketing team members can be added manually to a specific marketing object by navigating to the Team side navigation link. To add users to a marketing object, you should either be the owner of a marketing object or a member of its marketing team.

You can add either a User or a Team (group of users) to a marketing object. When a user is added to the marketing object, the user immediately has full access to the marketing object. However, if a Team is added to the marketing object, then you need to run the AMS - Team Access Refresh concurrent program to refresh the access privilege for users within the Team. For additional information about the concurrent program, refer to the *Oracle Marketing Implementation Guide*.

2.2 Oracle Marketing User Procedures

Procedures in this section are grouped in the following categories:

- [Section 2.2.1, "Creating and Managing Lists"](#)
- [Section 2.2.2, "Creating and Managing Imports"](#)
- [Section 2.2.3, "Creating and Managing Segments"](#)
- [Section 2.2.4, "Creating and Managing Campaigns"](#)
- [Section 2.2.5, "Creating and Managing Campaign Schedules"](#)
- [Section 2.2.6, "Creating and Managing Events"](#)
- [Section 2.2.7, "Creating and Managing Event Schedules"](#)
- [Section 2.2.8, "Creating and Managing Venues"](#)
- [Section 2.2.9, "Creating and Managing Products"](#)
- [Section 2.2.10, "Creating and Managing Offers"](#)
- [Section 2.2.11, "Creating and Managing Price Lists"](#)
- [Section 2.2.12, "Creating and Managing Budgets"](#)
- [Section 2.2.13, "Initiating Approvals"](#)
- [Section 2.2.14, "Creating and Managing Deliverables"](#)
- [Section 2.2.15, "Creating and Managing Messages"](#)
- [Section 2.2.16, "Creating and Managing Programs"](#)
- [Section 2.2.17, "Creating Click-Through Destinations"](#)
- [Section 2.2.18, "Working with Triggers"](#)
- [Section 2.2.19, "Associating and Managing Metrics, Costs and Revenues"](#)
- [Section 2.2.20, "Personalizing Home Page Bins, Reports, and Charts"](#)

2.2.1 Creating and Managing Lists

This section includes the following procedures:

- [Section 2.2.1.1, "Creating a List"](#)
- [Section 2.2.1.2, "Modifying Main List Attributes"](#)
- [Section 2.2.1.3, "Viewing and Modifying List Selections"](#)
- [Section 2.2.1.4, "Creating Custom SQL"](#)
- [Section 2.2.1.5, "Modifying List Options"](#)
- [Section 2.2.1.6, "Associating Suppression Lists"](#)
- [Section 2.2.1.7, "Generating a List"](#)
- [Section 2.2.1.8, "Viewing List Entries"](#)
- [Section 2.2.1.9, "Adding Manual Entries to a List"](#)
- [Section 2.2.1.10, "Exporting a List"](#)
- [Section 2.2.1.11, "Adding Notes to a List"](#)
- [Section 2.2.1.12, "Viewing Logs"](#)
- [Section 2.2.1.13, "Searching Lists for a Person or Organization"](#)

2.2.1.1 Creating a List

To create a list, complete the following steps.

Prerequisites

None

Steps

1. Navigate to Audience > List.
2. Click the Create button.
3. Provide a unique List Name.
4. Choose the List Type: Standard, Manual or Suppression.
See [Section 2.1.1.3, "List Types"](#) for more information.
5. Enter a Source Type.

A source type identifies the data source for this list. The seeded data sources include Persons (B2C attributes) and Organization Contacts (B2B attributes). The data source defines where the data comes from and how it maps to the Marketing List Entries table (AMS_LIST_ENTRIES). Additional data sources can be created by your System Administrator. See [Section 2.1.1.2, "Data Sources"](#) for more information.

- 6. Provide a brief description for this list.
- 7. Click **Create** to create the list.

The status of the list is initially Draft. The Owner is the person responsible for creating and maintaining this list

Note: Once you create a list, you cannot change the defined list type or source type.

2.2.1.2 Modifying Main List Attributes

Once the list is created, you can modify only the name, status, owner and description fields.

Prerequisites

An existing list

Steps

- 1. Navigate to Audience > List.
- 2. Click the List Name link in the Name column to display the List Detail page.
- 3. Modify the editable fields as desired.

The following table describes possible list statuses:

Table 2–13 List Statuses

Status Name	Status Description
Draft	The list has not yet been generated and hence will not be available for selection from other lists or campaign schedules.
Available	The list has been generated and the entries of the list are available for other lists and campaign schedules.

Table 2–13 List Statuses

Status Name	Status Description
Generating	This implies that the list has been submitted for Generation. This requires a Workflow Background Process to be running (the AMS - List Generation concurrent program). Refer to the <i>Oracle Marketing Implementation Guide</i> for additional information.
Cancelled	The list will not be available for other lists and campaign schedules.
Locked	The list attributes cannot be modified when the status of the list is locked. The status of this list has to be changed to Available to modify the attributes of this list.
Archived	The list will not be available for other lists and campaign schedules. All the list entries will be deleted.

4. Click Update to save your changes.

2.2.1.3 Viewing and Modifying List Selections

Use the Selections side navigation link to choose the components that make up this list. Select Import List, List, SQL, Segment, or Workbook as the record source for this list. If you select more than one record source, then you need to indicate the list order, operation (Include, Exclude or Intersect) and the de-duplication rank that needs to be associated with each of the record source making up this list.

The following table describes the attributes present in the List Selections page.

Table 2–14 List Selection Attributes

List Selection Attributes	Description
Order	Designates the order in which the individual record sources (or line items) will be incorporated in composing the list. The lowest numbered record source will be used first.

Table 2–14 List Selection Attributes

List Selection Attributes	Description
Operation	Options are Include, Intersect, and Exclude. ■ Include: This means to add all the entries in this record source to the list. Include is a mandatory operation for the first record source to be used in the list. ■ Exclude: This implies that all the list entries in this record source are excluded from the list. Exclude is generally used to remove a set of entries from a larger list definition. For example, “Include All Customers and Exclude Customers that have not ordered in the last three months” will result in a list of most active customers. ■ Intersect: This implies that all the entries that are common between this record source and the current list remain on the list. For example, “Include a list of college graduates and Intersect with a list of California state residents.” The resulting list contains only college graduates who live in California.
Type	Options include Import List, List, Segment, SQL, and Workbook. ■ Import List: is a record source of an imported purchased or rented list. ■ List: any existing Standard Manual or Suppression list (status = Available Locked) ■ Segment: is a saved criteria that can be used as a record source for this list. The status of the Segment should be Available. ■ SQL stands for Structured Query Language. Using a SQL statement is another method for storing the criteria used to select list entries. You can select the “Create Custom SQL” button to create a new SQL. ■ Workbook: is a Discoverer Workbook that contains the list of records that satisfy a user defined criteria defined through Discoverer. A workbook can have multiple worksheets. When you choose a Workbook as a list selection type the flashlight icon will display all the workbooks and their associated worksheets.
Name	Click on the flashlight icon at the end of the Name field to select from the Available objects of the selected record source Type (Import List, List, Segment, SQL or Workbook).

Table 2–14 List Selection Attributes

List Selection Attributes	Description
Dedupe Rank	Enter a De-duplication Rank for each record source. This is required for any Include operation. A de-duplication rank determines which record to retain when duplicate records are present within the List Entries. Deduplication occurs only during Include operations.
% of Records	You can specify the percentage of records to be selected from the record source. This field accepts only positive integers from 1 to 100. It's a method to restrict the number of entries from a selected record source. For example, if a record source has 1000 entries then entering a value of 50 in this field will result in 500 records to be selected from this record source. This is only applicable for Include operations
Available Records	Is a read-only field that will be populated when the list is generated. It displays the number of records that are available for this record source. This is only applicable for Include operations.
Requested Records	It indicates the number of records after the “% of Records” is applied. This column is populated after the list is generated. This is only applicable for Include operations.
Selected Records	It indicates the number of selected records after Deduplication is applied. This column is populated after the list is generated. This is only applicable for Include operations.

Prerequisites

An existing list

Steps

1. Navigate to Audience > List.
2. Click the List Name link in the Name column to display the List Detail page.
3. Click Selections on the side navigation. This link does not appear for Manual lists.
4. Complete the table, one row for each record source to be incorporated.
5. Click Update. The record sources will be incorporated and the Available Records, Requested Records and Selected Records columns will be updated. The Record Count Subtotal, Manual Additions and Record Count Total will also be updated.

2.2.1.4 Creating Custom SQL

Complete the following steps to create a Custom SQL query.

Prerequisites

An existing list

Steps

1. Navigate to Audience > List.
2. Click the List Name link in the Name column to display the List Detail page.
3. Click Selections on the side navigation.
4. Click the Create Custom SQL button.
5. Enter a unique Name for the Custom SQL. To select a SQL as a List Type, you will be accessing this SQL using this name.
6. Enter the Source Object name. This is the data source name for the SQL.
7. Enter the Primary Key for the data source (i.e., Source Object Name).
8. Enter a valid SQL statement in the SQL section. The SQL statement should contain the name of the data source and at least one master type data source key as part of your SELECT statement.

For example:

```
Select 'PERSON_LIST',AMS_PERSON_DETAILS_V.party_id from  
AMS_PERSON_DETAILS_V where rownum < 100
```

Note: Your SQL cannot contain “Order By” or “Group By” clauses within the statement.

9. Click Create to create your SQL definition.

2.2.1.5 Modifying List Options

You can restrict the size of your list by entering the corresponding list size options. You can also specify the de-duplication and the word standardization rules that need to be applied while generating a list.

The following table describes list option attributes.

Table 2–15 List Option Attributes

List Option Attribute	Description
Top Down	This is the default selection. Selecting this option will select customer records in a non-random method from the selected record sources associated with this List.
Every Nth Row	Choosing this option will select every nth row from the record sources. For example, entering a value of "5" will select every 5th row from the record source
Random	Choosing this option will select a random "x" % of rows from the record sources.
Record Count	You can specify the minimum and/or maximum number of records that are to be included while generating this list. The selection Method criteria (Top Down Every Nth Row Random) will be applied before the Record Count criteria. However, if the record count minimum is not met or the record count maximum is exceeded then the record count criteria prevails.
Remove De-duplication Using Rule	You can select the de-duplication rule that needs to be applied while generating this list. Selecting the Remove De-Duplication Using Rule does not actually remove duplicates from the list but instead flags them as duplicates and disables those records from the List Entries. The de-duplication rules can be configured by your System Administrator. Refer to the <i>Oracle Marketing Implementation Guide</i> for additional information.
Use Word Standardization	Word Standardization is used in the de-duplication process. For example, when the Word Standardization is checked, the words 'Street' and "St." are treated the same. The Word Standardization rules can be configured by your System Administrator. Refer to the <i>Oracle Marketing Implementation Guide</i> for additional information on this functionality

Prerequisites

An existing list

Steps

1. Navigate to Audience > List.
2. Click the List Name link in the Name column to display the List Detail page.

3. Select Options from the side navigation.
4. From the Selection Method choose:
 - Top Down: The percentage of records requested will be selected starting at the top of the list.
 - Every Nth Row: The percentage of records requested will be selected by choosing every nth record until the correct number is selected.
 - Random Percent of Rows: The percentage of records requested will be selected randomly from the available records.
5. Enter a Minimum number of records to select and a maximum number of records to select.
6. Select Remove Duplications Using Rule, if desired. Click Go to select a Deduplication Rule.
7. Select Use Word Standardization, if desired. Using Word Standardization will not change any text in your entries, but will convert words on a temporary basis for the purposes of comparison only.

2.2.1.6 Associating Suppression Lists

Suppression Lists may be associated with marketing objects like Campaign Schedules, Event Schedules and Offers in order to restrict the corresponding suppression list entries from being targeted during the marketing activity. For example, a marketer can create a “Global” suppression list that will automatically suppress the entries in this list from any future marketing activities. See [Section 2.1.1.8, "Suppression Lists"](#) for a description of seeded suppression lists.

In addition, a marketer can create a list of type “Suppression” and can associate the following suppressions to it

- Globally implies that customers or prospects cannot be contacted at all through any marketing activity.
- Suppression “By Activity” implies that customers or prospects on this list cannot be contacted through a specific channel. For example, creating a suppression list for an e-mail activity will automatically suppress the list entries for any e-mail marketing activities. You can create suppression lists for specific channels including “Mail”, “Fax”, “Phone” and “E-mail.”
- Suppression “By Campaign” implies that the customers or prospects on this list cannot be contacted for a specific marketing campaign.

2.2.1.7 Generating a List

Use this procedure to specify an immediate list generation or the generation of a list at a future date and time.

Prerequisites

An existing list

Steps

1. Navigate to Audience > List.
2. Click the List Name link in the Name column to display the List Detail page.
3. Select Generation from the side navigation.
4. If immediate Generation is desired, select Generate Immediately and click Update.
5. If future Generation is desired, select Generate at a future time and enter the date, time, and time zone in the future when the list should be generated. This may be changed to set the generation earlier or later.

Note: When a list is submitted for generation, the status of the list is changed to “Generating.” The AMS: List Generation background process has to be running to pick up the request to generate the list. Refer to the *Oracle Marketing Implementation Guide* for more information on setting up this background process.

The following table describes the functionality of the Generation Type while generating a List.

Table 2–16 List Generation Modes

Generation Type	Description
Standard	This is the default type of list generation. The list is generated (or re-generated) based on the list selection criteria (Oracle Discoverer Workbook, list, segment, etc.). Any old list entries will be deleted. This will also remove any manual adjustments that have been made to the list.

Table 2–16 List Generation Modes

Generation Type	Description
Incremental	In this mode, the old list entries for this list are not deleted. It will include all the entries from the previous list generation and any new entries added to the list since the previous generation date. For example, your marketing team may have reviewed the initial list and manually added or deleted entries from the list. By choosing this mode, you will capture any new customers or prospects who meet your list criteria and at the same time you will not remove any manual adjustments.
Update	In this mode, any changes to the customer attributes (e.g., First Name, Address, etc.) in the Oracle Customer Model (TCA) will be reflected in the corresponding list entry records. This mode will delete any list entry that does not satisfy the list criteria. It will also remove any manual adjustments made to the list. For an existing party record in the list entries table, the unique identifier (PIN#) for the list entry is retained after generating the list in Update mode (an important difference between Update and Standard mode).
Update No Purge	In this mode, any changes to the customer attributes (e.g., First Name, Address, etc.) in the Oracle Customer Model (TCA) will be reflected in the corresponding list entry records. List entries that no longer meet the list selection criteria will be retained. In addition, any manual adjustments made to the list will also be retained.

2.2.1.8 Viewing List Entries

Use the following procedures to display entries on a generated list.

Prerequisites

An existing list

Steps

1. Navigate to Audience > List.
2. Click the List Name link in the Name column to display the List Detail page.
3. Select Entries from the side navigation.
4. Click a column heading link to sort the list on the column.
5. Click Update.

Note: You can click the Personalize button to customize column and filter criteria for the List Entries page. For example, you can add columns such as State, Gender, Language, etc.

2.2.1.9 Adding Manual Entries to a List

Lists can be augmented by manually adding entries to the list. To manually add the entry, the customer record must already exist in the Oracle Customer Model (TCA).

Use this procedure to create or add manual lists.

Prerequisites

An existing list

Steps

1. Navigate to Audience > List.

Click the List Name link in the Name column to display the List Detail page.

2. Select Entries from the side navigation.
3. Select Add to List on this page to display the Person Search page.
4. Enter the search criteria (Person, Address or Relationship information) and select Search to locate the respective customer records.

From the search results, you have the option to Select All the records or selectively choose a subset of these records to be manually added to the List.

5. Select Add to List to manually add these entries to the List.

2.2.1.10 Exporting a List

Exporting a list generates a comma separated value (.csv) file that can be used within spreadsheet applications to further analyze the list entries. It can also be provided to third-party fulfillment houses for outbound execution.

Prerequisite

An existing List

Steps

1. Navigate to Audience > List.

2. Click the List Name link in the Name column to display the List Detail page
3. Select Entries from the side navigation.
4. Click the download icon to the right of the Add to List button.
5. Click Save File.
6. Select an appropriate location and click Save.

2.2.1.11 Adding Notes to a List

Adding Notes to a list can provide historical perspective on why a list was created and generated as well as indicate marketing object associations.

Use the following procedure to add a note to a list.

Prerequisites

An existing list

Steps

1. Navigate to Audience > List.
2. Click the List Name link in the Name column to display the List Detail page.
3. Select Notes from the side navigation.
4. Select the type of note to add from the drop-down list.
5. Enter the number of days for reviewing notes. Alternately, you can click All Notes for a complete listing of notes created for the list.
6. Click Create.

2.2.1.12 Viewing Logs

Logs detail the steps taken by both the user and the system in creating the marketing objects. The log is generally used by system administrators. If there is a problem creating the object, the Process Log may assist you in determining the cause of the problem.

2.2.1.13 Searching Lists for a Person or Organization

Use the following procedure to locate a person or an organization on all lists accessible to you.

Prerequisites

Existing lists

Steps

1. Navigate to Audience > Search.
2. Select Choose List Source. List Sources are either Consumers (B2C) or Organization Contacts (B2B).
3. Select Search All Lists or only Lists Created Between and supply the dates to limit the Search.
4. Click Search to begin the searching process.
5. Any lists in which the name appear will be displayed at the bottom of the page along with List Name, Consumer Name, Status, Generated Rows, Last Generation Date and Type.

2.2.2 Creating and Managing Imports

Oracle Marketing offers a list import process, enabling marketers to map an external data source, such as a purchased or rented list, or an existing customer database, to destination target fields either within the Oracle Customer Model (TCA) or a staging area within Oracle Marketing (for Rented Lists).

Procedures in this section include:

- [Section 2.2.2.1, "Creating an Import"](#)
- [Section 2.2.2.2, "Viewing a List Import"](#)
- [Section 2.2.2.3, "Import Error Handling"](#)
- [Section 2.2.2.4, "Existence Checking During Import"](#)

2.2.2.1 Creating an Import

Clicking the Create button on the Import summary page launches the list import wizard. The wizard walks the user through the process of importing a rented, purchased or a other lists.

Prerequisite

A flat file (.csv format) or an XML located on your desktop, or a server or an ftp site. The XML file format applies only to Organization Contacts (B2B) and Persons (B2C).

Steps

1. Navigate to Audience > Import.
2. Click Create to start the Import Wizard.
3. Select the Import Data Type. Options include:
 - Organizations, Contacts, Addresses (for importing B2B attributes)
 - Persons, Addresses (for importing B2C attributes)
 - Event Registrations (for importing event registrants)
 - Leads (for importing Leads)By default the Organizations, Contacts, Addresses option is checked.
4. You can either click Next to continue the import process or you can click Setup to configure the default import mapping and the fields that are to be exposed during Import Preview.
 - If you click Next, then proceed to step 5 of this procedure.
 - If you click Setup:
 - a. Specify the default import mapping for .csv files or XML files. By specifying this default mapping for an import type, you do not have to configure the mapping during the list import wizard process. The default import mapping for an import data type will be automatically applied to the import process.
 - b. You can also select the fields that are to be exposed during the import preview, by selecting the Available Fields to the Exposed Fields section.
 - c. Click Apply to apply the changes.
 - d. Click Return to return to the import wizard.

5. On clicking Next to continue the import process, you will be navigated to Step 1a: Import Definition.
 - a. Enter a unique name for the Import (mandatory).
 - b. Enter a brief description for this import.
 - c. Select the location for the source file.
 - * Choose Client if the source file is located on your computer. Click Go to browse for the location of the source file.
 - * Choose Server if the source file is located on a server. It must be located in the directory specified by your System Administrator. Refer to the *Oracle Marketing Implementation Guide* for additional information for server side imports.
 - * Choose FTP if you want to specify an FTP address for your source file. You will also have to provide your username, password (to access the file) and the file name.
 - d. Select the Character Set for your import source file. By default this will be set to 'Western ISO-8859-1'. You can also choose from European (ISO-8859-2), Japanese (SHIFT-JIS), etc.
 - e. Specify the column delimiter for your source file. By default this will be set to "Comma". For a .csv file, choose Comma. However, you can also specify Tab, Semi-Colon, Double Quotation, Single Quotation, Space as your column delimiter.
 - f. Select the Field Enclosed By for your source file. By default this will be set to "Double Quotation". For a .csv file, choose Double Quotation.
 - g. Select the File Header Exists check box, if the file has a header row. When you check this, make sure that the first line of your file has the column headings (field names).
 - h. You can select the de-duplication rule that needs to be applied while generating this import. This de-duplication rule will directly be applied only on the source file that is being imported. The de-duplication rules can be configured by your System Administrator.
 - i. Check the Use Word Standardization checkbox to apply Word Standardization Rules on the import data. Word Standardization is used in the de-duplication process. For example, when the Word Standardization is checked, the words 'Street' and "St." are treated the same. The Word Standardization rules can be configured by your System Administrator.

- j. Click Next to proceed to the next step of the import wizard.
- 6. Enter Additional Details for the import:
 - a. Select the source for your import: Purchased List, Rented List or Others.
 - b. Enter a Vendor and Cost. These are optional entries.
 - c. If you choose a Rented List as your source, you must enter either an expiration date or the number of uses.
 - * Number of Uses: The number of uses for a rented list is based on the number of campaign schedules that are made Active using a particular rented list.
 - * Expiration Date: You need to run a concurrent program (AMS: Purge Imported List) to purge the entries of the Rented List after the expiration date. If the source chosen is other than a rented list this is an optional entry.
 - d. Click Next to save and continue the import process.
- 7. In the Import Mapping section you can specify the mapping between your source fields to target fields.

You can load an existing mapping to map the source and target fields. This is beneficial if the source file has to be imported regularly. Rather than map the source and target fields each time, you can load an existing mapping that automatically maps the source and target fields.

You can manually map the source and target fields and enter a unique mapping name in the Save New Mapping field. This will create a reusable mapping that can be loaded using the "Load Existing Mapping" field.

- a. The column headings from the import source file are displayed in the left column (Source Fields). The available fields in the destination table are displayed in the middle column (Target Fields). Select an item from the left column (Source Fields) and the corresponding item from the middle column (Target Fields) and click the right (>) button to move the field mapping to the right column (Mapping: Source => Target). Continue until all desired fields are mapped. To remove an existing field mapping, highlight the item mapping in the right column and click the left (<) button to remove the field mapping.

For a complete listing of the Target Fields that are available, refer to the *Oracle Marketing Implementation Guide*.

- b.** Click Next to save the changes on this page and move to the next step of the import process. If a name for the new mapping is provided, then the new mapping will be saved. If a default mapping has been specified through the Import Setup, then this page will not be displayed during the Import process.
- 8.** Review the import information.
 - a.** You can specify the error threshold number for this specific import. This identifies the maximum number of errors that can occur during list import. For example, Error Threshold = 100, implies that there can be a maximum of 100 errors before the list import stops processing additional import records. Records prior to the error threshold being reached will be imported using the regular import logic.
 - b.** Check the Record Update flag if you want to update existing records. The list import process will use the existence checking rules to match the records in the import source file to the Oracle Customer Model (TCA). If a match is found, then the customer record in the Oracle Customer Model (TCA) is updated with additional information from the source file. If the Record Update Flag is unchecked, then the import source file records are inserted into the Oracle Customer Model (TCA) even if a match exists between the Oracle Customer Model (TCA) record and the import source file.
 - c.** Check the Validate Data field if the data has to be validated (e.g., date fields to accept data in the date format, data for a field with a list of values should contain one of the values specified, etc.)
 - d.** To automatically generate a list upon import, check the Generate a List upon Import field. By default this field is unchecked. If you check this field, you also need to provide the List Name. By default, the List Name will have the same name as the Import name. You can overwrite the default List Name.
 - e.** Select the Preview button to preview the data being imported. The fields that are displayed in the Preview page are based on the “Exposed Fields” that are set up in the Import Setup page. By default, the mandatory fields are always displayed as part of the Preview page
 - f.** After reviewing the details on this page, click Import to begin the import process.

9. A confirmation page will be displayed. Click Finish to return to the Import Summary Page where the import results may be viewed or click New Import to import data from a new source file.

2.2.2.2 Viewing a List Import

Imports are shown on the summary page with their Type, Status, ID, Creator, Import Date, Number of Records and Log.

Prerequisites

None

Steps

1. Navigate to Audience > Import.
2. Click the List Import Name to display the List Import Details page.
3. Click the Log icon to display the log for the List Import.
4. Click Finish to return to the List Import Summary Page.

2.2.2.3 Import Error Handling

If there is an error during list import, then the status of this import will be “Error” (if no import records were successfully imported) or “Incomplete-Errors” (if some of the import records were successfully imported). You can drill down into the import results to obtain additional information about the errors (for example number of error records, number of duplicate records).

Additionally, within the context of a list import error results, the Search feature enables you to query results based on certain key attributes like first name, last name and so on.

Prerequisites

- An import error while importing data from a source file to Oracle Marketing
- The status of the import is “Error” or “Incomplete-Errors”

Steps

1. On the Import Summary Page, click on the corresponding name of the list import.
 - The import details page summarizes the details of the import and the import error results.
 - The Import Results contains the number of imported records and hyperlinks to the number of error records and the number of duplicate records.
2. Click the Number of Error Records link to obtain additional information about the error. The error records page has hyperlinks to the individual error records, the row number of the error record in the source file, the status of the error record and a brief description of the respective error.
 - a. Click on the corresponding error record hyperlink to view the error details for the respective error record. The incorrect values for the import fields are highlighted with reason for its failure. Errors can arise due to mismatches in data type, no import data for a mandatory field in the system, or if the import value does not match the lookup values for the corresponding data field.
 - b. You can correct the identified errors and click Update to directly update the error record. This record is now ready to be re-imported.
 - c. Click on the Reload button in the import details page to re-import the updated records into the Oracle Customer Model (TCA)
3. Click the Number of Duplicate Records link to identify the duplicate records during list import. The duplicate records page has hyperlinks to the individual duplicate records. Click on the corresponding duplicate record to view the details.
 - a. You can modify the data to make this record unique and click Update to directly update the record.
 - b. Click on the Reload button in the import details page to re-import the updated records into the Oracle Customer Model (TCA).
4. Click the Search button in the Import Details page to query the import results. You can search based on Load Status (Error, Active, Duplicate, Reload, Success), Load Date, First Name, Last Name, etc.). Click on the Import Name link on this page to go back to the Import Details page.

2.2.2.4 Existence Checking During Import

Existence checking is the process of de-duplicating an imported list against the Oracle Customer Model (TCA). Existence checking is done for the following:

- Organizations (B2B)
- Organization Contacts (B2B)
- Addresses (for both B2B and B2C)
- Persons (B2C)

Organizations (B2B)

For organizations, existence checking is based on Organization Name, Address1 and Country columns.

- First it checks if an Organization exists with the same name. If it does not exist then it creates a new record.
- If the Organization Name exists then it checks if an organization record exists with the same Organization Name, Address1 and Country. If it does not exist then it checks with the same Organization Name and Country. If this also does not exist then it picks up the maximum(party_id) record with the same Organization Name without checking Address1 and Country column.

Even if it gets the records with Organization Name, Address1 and Country or Organization Name and Country, it always picks up the maximum party_id for the Organization Name.

Organization Contacts (B2B)

Existence checking for Organization Contacts is based on Person First Name, Person Last Name, E-mail Address, Phone Area Code, Phone Number and Phone Extension.

- First it checks if a Person exists with the provided First Name and Last Name. If it does not exist then it creates a new record for this Person and creates a relationship of “Contact Of” with the Organization.
- If a Person record exists with the same First Name and Last Name, then it checks if this record has the same E-mail Address, Phone Area Code, Phone Number and Extension. If this does not exist then it checks the First Name, Last Name with E-mail Address. If this also does not exist then it checks the First Name, Last Name with Phone Area Code, Phone Number and Phone Extension. If this also does not exist then a new Person record is created with a relationship of “Contact Of” with the Organization.

Address (B2B and B2C)

Address existence checking is based on the Address1, City, Postal code and Country.

First it checks if there is a location entry for the provided Address1, City, Postal Code and Country column. If this does not exist then it checks for Address1 with Country and picks up that location if it's available otherwise creates a new one.

Person (B2C)

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

First it checks if a person exists with the provided E-mail Address. If it does not exist then it checks with First Name, Last Name with Phone attributes. If this also fails then it looks for First Name, Last Name with address attributes. If this does not exist, then a new Person record is created.

Original System Reference

Original System Reference is a new target field that has been added to the list import process. This affects the list import existence checking in the following way:

- For Organizations (B2B): If “Original System Reference” is mapped then existence checking will use this value along with Organization Name and other attributes like Address1 and Country to find the exact match. If it's not able to find any matching record then existence checking will be done without the Original System Reference column and this is same as the Organization existence checking logic.
- For 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 like E-mail Address, Phone Area Code, Phone Number and Phone Extension to find the exact match. If it's not able to find any matching record then the existence checking will be done without the “Original System Reference” column and this is same as the Organization Contacts existence checking logic.
- For 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, E-mail Address, Phone Country Code, Phone Area Code and Phone Number to find the exact match. If it's not able to find any matching record then the existence checking will be done without the

“Original System Reference” column and this is same as the Persons existence checking logic.

2.2.3 Creating and Managing Segments

Procedures in this section include:

- [Section 2.2.3.1, "Creating a Segment"](#)
- [Section 2.2.3.2, "Viewing and Editing a Segment"](#)
- [Section 2.2.3.3, "Viewing Segment Hierarchies"](#)

2.2.3.1 Creating a Segment

Use the following procedure to create a segment. See [Section 2.1.2.3, "Segment Attributes"](#) for a description of segment attributes.

Prerequisites

None

Steps

1. Navigate to Audience > Segment.
2. Click Create.
3. Enter a Segment Name.
4. Enter a Segment Code.
5. If you want to create a segment hierarchy, select a parent segment. The current segment definition will be a child of this parent segment.
6. The initial status will be Draft.
 - Setting the status to Available implies that the segment is available in lists and target groups.
 - Setting the status to Cancelled implies that the segment is not available in lists and target groups.
7. Select the Type. If the Type is Workbook, click the flashlight icon to select a Workbook. If the Type is SQL, then enter a SQL statement in the SQL field.
8. Enter a Description.
9. Click Create.

2.2.3.2 Viewing and Editing a Segment

From the Segment summary page, you can display and view the detail information for the selected segment.

Prerequisites

An existing segment

Steps

1. Navigate to Audience > Segment.
2. Click the segment name to display the details of that segment.
3. In the Type field, you can select either a Workbook or an SQL.
 - a. To select a workbook, click Go in the Type field for a listing of available workbooks.
 - b. To select SQL as your type, enter the data source name into the Type field and an SQL statement in the SQL field.

In order to create a list directly from a segment, your segment SQL should meet the following criteria:

- Your Segment SQL must be a valid SQL.
- At least one master type data source key should exist in your select statement.
For example: `select 'PERSON_LIST', AMS_PERSON_DETAILS_V.party_id from AMS_PERSON_DETAILS_V where rownum < 100.`

2.2.3.3 Viewing Segment Hierarchies

Use the following procedure to view a segment hierarchy.

Prerequisites

An existing segment hierarchy

Steps

1. Navigate to Audience > Segment.
2. From the Segment Summary page, select a segment and click View Hierarchy. The Segment Hierarchy page displays the segment hierarchy for the selected segment.

Note: You can use the **Personalize** button on the Segment Summary page to add the segment size column to your segment summary display.

3. You can view the number of children and the segment counts for the subsegments. You can refresh the count by running a concurrent program (AMS Refresh Party Market Segments). See the *Oracle Marketing Implementation Guide* for more information on concurrent programs.

2.2.4 Creating and Managing Campaigns

Procedures in this section include:

- [Section 2.2.4.1, "Creating a Campaign"](#)
- [Section 2.2.4.2, "Copying a Campaign"](#)
- [Section 2.2.4.3, "Viewing and Editing a Campaign"](#)
- [Section 2.2.4.4, "Entering Campaign Details"](#)
- [Section 2.2.4.5, "Associating Messages with a Campaign"](#)
- [Section 2.2.4.6, "Identifying Geographies for Campaign Execution"](#)
- [Section 2.2.4.7, "Adding Products to a Campaign"](#)

2.2.4.1 Creating a Campaign

The following table lists the input fields for the Create Campaign page, with a description of each. Unless otherwise noted, all fields require input.

Table 2–17 Campaign Creation Input Fields

Field	Description
Setup Type	Refers to the custom setups created by the system administrator in the Administration tab. After selecting a setup type, the system redisplay the page. There may be additional fields displayed as well as fields that are removed from view.
Name	A unique, identifying name for the campaign
Program	A pre-defined program which you can associate with your campaign.

Table 2–17 Campaign Creation Input Fields

Field	Description
Source Code	A unique code identifying the campaign. You can either define a code in this field, or leave it blank. In which case, the system will generate a unique source code upon creation of the campaign.
Business Unit	The business unit to which the campaign belongs.
Version	A method for tracking version of a campaign. Versioning is used to provide marketers with different scenarios during the planning phase. Only one of the plans is then executed. Only one version can be active at a given time.
Purpose	A general list of objectives for creating a new campaign. The list is defined during installation and is useful when categorizing campaigns.
Start/End Period and Start/End Dates	Indicates planned dates for the campaign. Once a period is entered, the dates are automatically entered based on the period dates. The objects can be used after creation and are available as long as they are active in the system. These dates are primarily for execution purposes. Active objects are available in other applications even if the end dates have passed.
Currency	The default currency for monetary aspects of the campaign.
Priority	Used for informational purposes when requesting approvals. Based on the priority of the campaign, the approval rules can be created to route the approvals appropriately (e.g., a high priority e-mail may go through a single level of approvals while a standard campaign may require a multi-level approval).
Owner	The person with primary responsibility for the campaign. The creator of the campaign is the default owner. The owner of the object is the only person who can add team members.
Global	The Global flag does not expose the object to global users. The global flag ensures a global source code for the object. This can be used for reporting purposes. This change applies to all objects.
Country	The country in which the campaign is available.

Table 2–17 Campaign Creation Input Fields

Field	Description
Confidential	Indicates that the campaign is unavailable for viewing to all members, other than your team, until the campaign is active. Once active, all other users can view the campaign. Note: The confidential flag is designed for things like events in the planning stage where you do not want users to see it until the event is active. Once it becomes active all users will be able to see a metadata report of the object (i.e., campaign). Team members, however, will still be able to view and edit the object regardless of the Confidential flag setting. Also, if you want the campaign to remain confidential after it becomes active, you will need to check the confidential flag again as the process of making it active removes the flag.
Language	The intended language of execution. This is for informational purposes only and has no effect on functionality.
Template	If checked, the Template flag on the campaign indicates that the campaign cannot be taken active. This means that users can copy a template campaign along with its schedules and plan executions based on the structure of the template campaign. Template campaigns would normally be setup at the corporate level and the schedules copied and executed as needed.
Description	A brief description of the campaign. Note: Adding a Description helps fill in the details not immediately viewable on this page.

Complete the following procedures to create a new campaign.

Note: To create a campaign that is similar to an existing campaign, you can copy the existing one and modify it rather than creating a new one.

Prerequisites

Established Custom Setups, Marketing Mediums and Campaign Activities

Steps

1. Navigate to Campaign > Campaigns.
2. Click Create.

3. Choose a Setup Type from the LOV.
4. Enter a name for the campaign.
5. Select a program to associate this campaign with.
6. Enter a unique source code. If you bypass this field, the system automatically generates a source code.
7. Select a business unit and campaign version.
8. Select the purpose for the campaign from the drop-down list. Select from a list of purposes which may be useful in further categorizing campaigns.
9. Select a start period for the campaign.
10. Select start and end dates for the campaign.
11. Select a currency, priority, and owner for the campaign.
12. Select Global, Language, and Template as appropriate for your campaign.
13. Enter a description for your campaign.
14. Click Create. You will received confirmation on the creation of the new campaign.

2.2.4.2 Copying a Campaign

Use the following procedures to copy a campaign.

Prerequisites

An existing campaign

Steps

1. Navigate to the Campaign tab.
2. Select the link for the campaign to be copied. The Campaign Details page appears.
3. Click Copy. The Copy Campaign page appears.
4. Make sure that the campaign to be copied appears in the Source Campaign field. If it does not, select it using the list of values (LOV).
5. Enter a name for the new campaign.

Do not enter a Source Code. This field is populated by the application automatically.

6. Enter the dates the new campaign is effective.
7. Select the check boxes of the items to copy to the new campaign. Only the attributes populated with data appear on the list.

If schedules are attached to a campaign, the ability to copy schedules is also provided, the associated schedules can be selectively copied.
8. Click Copy. The new campaign is created.
9. Click the Campaign link.
10. Click the link of the new campaign
11. If required, place the campaign into the campaign hierarchy by entering a parent campaign in the Parent field.
12. Edit the details or add additional information for the new campaign.
13. Click Update to save your changes.

2.2.4.3 Viewing and Editing a Campaign

Use the following procedures to view and edit a campaign. Most of the items on this page are editable, but some are not due to relationships between those items and the items on other pages and components of a Campaign.

Prerequisites

None

Steps

1. Navigate to Campaign > Campaigns.
2. If the desired Campaign is not displayed on the list, search for it by changing the View Type, or using by QuickFind or Personalized Search.
3. Click the Campaign link to view or edit. The Campaign Details Page displays.
4. Edit fields as appropriate.
5. Click Update.

2.2.4.4 Entering Campaign Details

There are four groups of Campaign components, not all of which will be available for use with every campaign: Planning, Execution, Track and Collaboration. The Campaign components are determined by the Custom Setups in the Administration Tab.

Prerequisites

An existing campaign

Steps

1. Navigate to Campaign > Campaigns.
2. If the desired Campaign is not displayed on the list, search for it by changing the View Type, or using by QuickFind or Personalized Search.
3. Click the link in the Name column to display the Campaign Details page.
4. Enter campaign details, as required.
5. Click Update.

2.2.4.5 Associating Messages with a Campaign

The Message item on the side navigation link is used to associate a marketing Message to a Campaign. Marketing Messages refer to products, products families or organization vision. Marketing messages are not automatically pushed out as content with a campaign.

Prerequisites

An existing message

Steps

1. Navigate from the Campaign to Planning > Message.
2. The Message page displays.
3. Select the following Items:
 - a. Message Type: Product, Product Family or Vision
 - b. Click the search icon at the end of the Message column to select a Message.
 - c. Click Update.

4. To see the Message Details page for the selected Message, click the link in the Message column.

2.2.4.6 Identifying Geographies for Campaign Execution

The Geography side navigation link indicates the geographic location of the campaign execution. The first division of a national or global campaign is usually by geography.

Prerequisites

None

Steps

1. Navigate to Planning > Geography.
2. Select a Level from drop-down list.
3. Click the Search icon at the end of the Name column to display a list of geographies at the selected Level.
4. Click Update.

A confirmation message will be displayed. The Location column will display the geographic level the named Geography is contained in. This is an information field only and does not have any functional impact. The information can be used for reporting purposes.

2.2.4.7 Adding Products to a Campaign

The Products link is used to create inventory items and product families. Products can be used for eligibility in budgets and offers.

Prerequisites

None

Steps

1. Navigate to Planning > Products.
2. Select a Product Family by clicking the search icon at the end of the Category field. The Description field fills in automatically.
3. If this Product Family is to be excluded, select the box in the Exclude column.

4. Select a Product by clicking the search icon at the end of the Product Number field. The Description field fills in automatically.
5. If this Product is to be excluded, select the box in the Exclude column.

2.2.5 Creating and Managing Campaign Schedules

Procedures in this section include:

- [Section 2.2.5.1, "Creating a Campaign Schedule"](#)
- [Section 2.2.5.2, "Copying a Campaign Schedule"](#)
- [Section 2.2.5.3, "Creating a Target Group for a Campaign Schedule"](#)
- [Section 2.2.5.4, "Modifying a Target Group for a Campaign Schedule"](#)
- [Section 2.2.5.5, "Viewing Target Group Entries"](#)
- [Section 2.2.5.6, "Viewing and Modifying Control Group Entries"](#)
- [Section 2.2.5.7, "Viewing and Editing a Campaign Schedule"](#)
- [Section 2.2.5.8, "Adding a Message to a Campaign Schedule"](#)
- [Section 2.2.5.9, "Removing a Message from a Campaign Schedule"](#)
- [Section 2.2.5.10, "Selecting Products or Product Families for a Campaign Schedule"](#)
- [Section 2.2.5.11, "Removing Product or Product Families from Campaign Schedules"](#)
- [Section 2.2.5.12, "Adding a Deliverable to a Campaign Schedule"](#)
- [Section 2.2.5.13, "Removing a Deliverable from a Campaign Schedule"](#)
- [Section 2.2.5.14, "Sourcing Budgets for Campaign Schedules"](#)
- [Section 2.2.5.15, "Removing a Budget Request from a Campaign Schedule"](#)
- [Section 2.2.5.16, "Transferring Funds from a Campaign Schedule to a Budget"](#)
- [Section 2.2.5.17, "Updating Campaign Schedule Budgets"](#)
- [Section 2.2.5.18, "Removing a List from a Campaign Schedule Target Group"](#)
- [Section 2.2.5.19, "Creating a Campaign Schedule Using Oracle Advanced Outbound"](#)

2.2.5.1 Creating a Campaign Schedule

Campaign Schedules may have many different components as determined by the Activity Type and Activity and defined in Custom Setup on the Administration tab. Your Campaign Schedule may not have all the side navigation links listed.

Campaigns Schedules are created to execute Campaign activities.

Prerequisites

An existing campaign

Steps

1. Navigate to Campaign > Campaigns.
2. Click the Campaign link to display the Campaign Details Page.
3. Navigate to Execution > Campaign Schedules.
4. Click Create.
5. Select a Setup Type for the Campaign Schedule. The setup types are created by your system administrator. The Create Campaign Schedule page will re-display after selecting a setup type to update the Activity Type and Activity fields. If the activity type can utilize a trigger, the system adds a Trigger Details section to the Create Campaign Schedule page.
6. Enter a Name for the Campaign Schedule.
7. Select a Language to be used to for the Campaign Schedule execution.
8. Use Parent Source Code is checked by default. If creating multiple Schedules for a particular Campaign, it may be useful to have unique source codes for each schedule. Deselect the Use Parent Source Code checkbox to generate a unique Source Code for the Campaign Schedule. If left checked, the Source Code for the Campaign will be used.
9. The Coordinator is the person responsible for the execution of the Campaign Schedule.
10. The Source Code field should be left blank. The system will insert the Campaign Source Code or generate a unique Source Code for the Campaign Schedule.
11. The Activity Type and Activity are determined by the Setup Type and may not be modified.

12. Select a Marketing Medium if desired. Certain execution channels, such as Oracle Advanced Outbound, require particular Marketing Mediums to be selected for a Campaign Schedule.
13. Select a Currency for the Campaign Schedule.
14. Select a Time Zone for the geographic location where the Schedule Activity will be taking place.
15. Enter Start and End Dates and Start and End Times.
16. Select an Objective.
17. Select a priority. Priorities are used for informational purposes when requesting approvals.
18. Enter a Description.
19. Complete the Trigger Details section:
 - a. Select Do Not Use Trigger to executed the Schedule manually at the Start Date and Start Time specified. Select Use Trigger to have the Schedule activated only after the specified Trigger has met its test condition.
 - b. Select a Trigger Condition. Executed After Approval by. If this use of a Trigger must be approved, Select an Approval person.
 - c. Send Notification to. When the Trigger is approved, the notification should be sent to this person.
20. Click Create. The Campaign Schedule Details Page with the side navigation displays.

Note: The sender's and reply to e-mail addresses are defaulted into the campaign schedule - e-mail content based on the value of the AMF : Mail profile option. These fields are not updatable.

2.2.5.2 Copying a Campaign Schedule

Using this functionality, you can copy an existing campaign schedule to create a new one with similar values.

The following table lists the input fields for copying a campaign schedule, with a description of each.

Table 2–18 Copy Campaign Schedule Input Fields

Field	Description
Name	The name of the campaign schedule you are copying.
New Schedule Name	The name you want to give to the new schedule.
Campaign	Indicates the campaign you want associated with your new campaign schedule.
Source Code	A unique code identifying the campaign. You can either define a code in this field, or leave it blank. In the later case, the system will generate a unique source code upon creation of the campaign.
Use Parent Source Code	Indicates whether you want to use the parent source code of the campaign schedule you are copying.
Coordinator	The name of the person coordinating the campaign schedule.
Currency	This is the default operating currency for monetary aspects of the campaign schedule.
Start Date	The date on which the e-mail campaign is scheduled to begin.
End Date	The date on which the e-mail campaign is scheduled to end.
Language	The primary language of those using the campaign.
Copy/Components	Click the Copy checkbox for each component you want identified as a component of the new schedule. Examples of components include: ■ Main ■ Message ■ Partners ■ Products ■ Attachments ■ Deliverable

Prerequisite

An existing campaign schedule

Steps

To copy a campaign schedule, complete the following steps.

1. Navigate to Execution > E-mail.
2. Click Copy.
3. Enter the name of the campaign schedule you want to copy, using the search icon. The system populates the Name field with your choice, and then populates each of the remaining fields with the details of the campaign schedule of choice.
4. Enter a new name for the schedule. Initially, the words “copy of” appear, naming the schedule you copied. To enter the new name, highlight the displayed name and type in the new one.
5. Enter the campaign you want associated with the new campaign schedule.
6. Enter a source code.
7. Click the Use Parent Source Code checkbox, as appropriate.
8. Enter a coordinator, using the search icon.
9. Enter a currency for the campaign schedule, using the drop-down list.
10. Enter the campaign schedule’s start and end date, using the calendar icon.
11. Enter a language for the campaign schedule, using the drop-down list.
12. Click the appropriate Copy checkbox to indicate which of the listed components you want to include in the campaign schedule.
13. Click Copy.

2.2.5.3 Creating a Target Group for a Campaign Schedule

A Target Group for a campaign schedule specifies the list or lists associated with the campaign schedule. Certain activity types require a generated list in order to make the campaign active. For example, any direct marketing activity type (direct mail, e-mail, fax or telemarketing) requires a generated list. You can generate a target group using any combination of the following:

- List
- Segment
- Employee List

A segment is a dynamic criteria that will be executed when the target group is generated. For example, a segment could be defined as a condition to obtain residents living in the state of California. Now, if this segment is associated with a target group, then the number of records satisfying the segment criteria at the time of generating the target group will be considered as part of the target list entries.

However, for a List or Employee List, the number of entries is static. This implies that if a list or employee list is associated with a target group, then the static number of entries in these lists when the lists were generated per se will become part of the target group list entries.

Use the following procedure to create a target group.

Prerequisites

- A generated list or segment
- An existing campaign with a campaign schedule

Steps

1. Navigate to the Campaign tab and click any Campaign name.
2. From the side navigation, click Execution > Campaign Schedule.
3. Click any Campaign Schedule name.
4. From the side navigation, click Execution > Target Group.
5. Enter the Target Group details:
 - a. Enter a name for the target group.
 - b. Select a target group type from the drop-down list (Persons, Organization Contacts, etc.)

- c. Select a Generation Type. See [Table 2–16, "List Generation Modes"](#) for a description generation types.
6. Click the No Control Group or Using Control Group radio button as appropriate.

A Control Group is a list of customers or prospects who will not receive the campaign information. If you choose to use a Control Group, enter the percentage (percentage of the Target Group) or the count of records for the Control Group. Records will be randomly selected for the Control Group. If you are adding more Lists to the Target Group or modifying a previous entry (count or percent) for the Control Group, be sure to regenerate the Target Group.

7. Click Purge List Entries After Grace Period.

If this is selected, then the entries of the Target Group are purged based on the concurrent program AMS - Purge Target Group and the profile option AMS: Grace Period in Days. Refer to the *Oracle Marketing Implementation Guide* for additional information.

8. Choose the Selection Type that you would like to associate with this target group.

You can choose from List, Segment and Employee List for the selection types. Click the Go button to select the appropriate list. Only the lists and segments with an Available status will be shown here.

9. For a target group associated with a telemarketing campaign schedule, you can optionally enter a Group Code for each of the target group selection types. The Group Code can be used to logically group selections within a Target Group and assigned to telemarketing agents using Oracle Advanced Outbound.

10. Click Create to create the Target Group.

11. Click Generate Target Group to generate the Target Group.

Suppression rules (based on suppression list entries with “available” status), control group entries, and de-duplication rules (based on activity type) will be applied when generating the Target Group. After the Target Group is generated, the count for Available Records, Suppressed Records, Duplicate Records and Total Records will be displayed in the Summary section of the Target Group.

You need the AMS - List Generation concurrent program to be running in the background to generate the Target Group. Refer to the *Oracle Marketing Implementation Guide* for additional information.

Your system administrator can configure the de-duplication rules that are based on activity (ADDRESS-DUPPLICATION-RULE, EMAIL-DUPPLICATION-RULE, PHONE-DUPPLICATION-RULE, FAX-DUPPLICATION-RULE). Refer to the *Oracle Marketing Implementation Guide* for additional information on this topic.

2.2.5.4 Modifying a Target Group for a Campaign Schedule

Use the following procedures to modify a target group.

Prerequisites

- A generated list or segment
- An existing campaign with a campaign schedule

Steps

1. From the Campaign Schedule Details Page, navigate to Execution > Campaign Schedules.
2. Modify the generation type, control group fields, Purge List Entries After Grace Period checkbox, and list entries, as appropriate.
3. Click Update to update the file or Generate Target Group, to generate the target group.

2.2.5.5 Viewing Target Group Entries

Use the following procedure to view target group entries.

Prerequisite

An existing campaign schedule with a target group containing one or more lists

Steps

1. From the Campaign Schedule Details Page, navigate to Execution > Target Groups.
2. In the Target Group Details page, click the link associated with the Target Group list name to view the target group entries.

2.2.5.6 Viewing and Modifying Control Group Entries

A Control Group is a list of customers or prospects who will not receive the campaign information. Use the following procedure to view or modify the control group entries.

Prerequisite

- An existing campaign schedule with a target group containing one or more lists
- Control Group Percent or Control Group Count entered for this target group
- The Target Group should be generated

Steps

1. From the Campaign Schedule Detail page, navigate to Execution > Target Group.
2. In the Target Group Details page, click the link associated with the Target Group List Name.
3. Click on the Personalize button on the Target Group list entries page.
4. In the Filter Search By, check the All Records radio button.
5. In the Display Options section, select the Control Group item from the left (Available) column. Select the right (>) button to move the Control Group field to the right (Displayed) column.
6. In the Save Search As, enter a unique search name for this search.
7. Select the Save and Apply button to save the search and apply it.

The Control Group column will now be displayed in the new Saved Search. The records with the associated Control Group column checked are the Control Group entries for this Target Group. You can view and modify the Control Group entries from this page.

2.2.5.7 Viewing and Editing a Campaign Schedule

Use the following procedure to edit and view a campaign schedule.

Prerequisites

An existing campaign schedule

Steps

1. Navigate to Execution > Campaign Schedule.
2. Click the link in the Name column to display the details for that Campaign Schedule. The campaign details are displayed at the top of the page.
3. The Schedule Details displays the following fields:
 - a. Name.
 - b. Status. Do not change the Status to Active until all of the components required to execute the Schedule are in place, including generating Lists necessary for direct mail, telemarketing or e-mail activities.
 - c. The Use Parent Source Code box is checked if the Schedule will use the Campaign's Source Code.
 - d. Coordinator. The person responsible for the Schedule.
 - e. Source Code. This can be unique to the schedule or if the Use Parent Source Code checkbox is selected, this will match the Source Code for the Campaign.
 - f. Activity Type and Activity. This are set when the Schedule is created and may not be modified.
 - g. Marketing Medium. The marketing channel the Schedule is processed through.
 - h. Currency.
 - i. Time Zone. This is the time zone for the geographic location where the Schedule Activity will be taking place.
 - j. Start and End Dates and Start and End Times.
 - k. Objective.
 - l. Priority.
 - m. Language. The intended language of execution. This is for informational purposes only and has no effect on functionality.

- n. Description.
- 4. The Trigger Details section has the following fields.
 - a. Select Do Not Use Trigger to executed the Schedule manually at the Start Date and Start Time specified. Select Use Trigger to have the Schedule activated only after the specified Trigger has met its test condition.
 - b. Select a Trigger Condition.
 - c. Executed After Approval by. If this use of a Trigger must be approved, Select an Approval person.
 - d. Send Notification to. When the Trigger is approved, the notification should be sent to this person.
- 5. Click Update to save your changes. The system displays a confirmation message.

2.2.5.8 Adding a Message to a Campaign Schedule

Use the following procedure to add a message to a campaign schedule.

Prerequisites

An existing campaign schedule

Steps

1. Navigate to Campaign > Campaigns.
2. Click the Campaign link to display the Campaign Details Page.
3. Navigate to Planning > Message from the side navigation.
4. Select a Message Type.
5. Click the search icon at the end of the Message field to display a list of messages of the selected Type.
6. Select a Message to add to the Campaign Schedule.
7. Click Update. The system displays a confirmation message.
8. Click on the Message link to display the details page for the message.

2.2.5.9 Removing a Message from a Campaign Schedule

Use the following procedure to remove a message to a campaign schedule.

Prerequisites

A campaign schedule with a message

Steps

1. Navigate to Campaign > Campaigns.
2. Click the Campaign link to display the Campaign Details Page.
3. Navigate to Execution > Campaign Schedules.
4. Select the appropriate Campaign Schedule.
5. Navigate to Planning > Message.
6. Select the checkbox in the Remove column of the Campaign Schedule Message table for the Message to be removed.
7. Click Update. The system displays a confirmation message.

2.2.5.10 Selecting Products or Product Families for a Campaign Schedule

Selecting a Products or Product families for a Campaign Schedule limits that Campaign Schedule to those Products or Product Families. You can also use the functionality to exclude products from the schedule.

Prerequisites

An existing Campaign and Campaign Schedule.

Steps

1. Navigate to Campaign > Campaigns.
2. If the desired Campaign is not displayed on the list, search for it by changing the View Type, or using by QuickFind or Personalized Search.
3. Click the Campaign link to display the Campaign Details Page.
4. Navigate to Execution > Campaign Schedules.
5. Select the appropriate Campaign Schedule.
6. Navigate to Planning > Products.
7. To select a product family for a campaign schedule, select a category set.

8. Click the search icon in the Description column to display a list of product families that belong to that particular category set.

Note: Within a given category set, there can be just one primary flag which can be checked.

9. To select a Product for a Campaign Schedule, Click the search icon in the Product Number column to display a list of Products. Select a Product to fill in the Product Number and Product Name columns. If this Product is to be excluded from the Campaign Schedule, select the checkbox in the Exclude column.
10. Click Update. The system displays a confirmation message.

2.2.5.11 Removing Product or Product Families from Campaign Schedules

Use this procedure to remove products from a campaign schedule.

Prerequisites

An existing Campaign with a Campaign Schedule.

Steps

1. Navigate to Campaign > Campaigns.
2. If the desired Campaign is not displayed on the list, search for it by changing the View Type, or using by QuickFind or Personalized Search.
3. Click the Campaign link to display the Campaign Details Page.
4. Navigate to Execution > Campaign Schedules.
5. Select the appropriate Campaign Schedule.
6. Navigate to Planning > Products.
7. Select the checkbox in the Remove column next to the Product or Product Family to be removed.
8. Click Update. The system displays a confirmation message.

2.2.5.12 Adding a Deliverable to a Campaign Schedule

Adding a Deliverable to a Campaign Schedule sets up automated delivery of the Deliverable when used with a Direct Marketing Campaign Schedule.

Note: The fulfillment action type is used only for Events.

Prerequisites

An existing Campaign with a Campaign Schedule.

Steps

1. Navigate to Campaign > Campaigns.
2. Click the desired campaign link to display the Campaign Details Page.
3. Navigate to Execution > Campaign Schedules.
4. Select the appropriate Campaign Schedule.
5. Navigate to Planning > Deliverables.
6. Select a Deliverable Type.
7. Click the search icon in the Name column to display a list of Deliverables of the selected type. Select a Deliverable to complete the Name field.
8. Enter a Quantity.
9. Select a date the Deliverable is Needed By.
10. Select a Fulfill on action type (Events Only). This is for information purposes only.
11. Click Update. The system displays a confirmation message.

2.2.5.13 Removing a Deliverable from a Campaign Schedule

Prerequisites

An existing Campaign with a Campaign Schedule.

Steps

1. Navigate to Campaign > Campaigns.

2. If the desired Campaign is not displayed on the list, search for it by changing the View Type, or using by QuickFind or Personalized Search.
3. Click the Campaign link to display the Campaign Details Page.
4. Navigate to Execution > Campaign Schedules and select the appropriate Campaign Schedule.
5. Navigate to Planning > Deliverables and select the checkbox in the Remove column of the appropriate Deliverable.
6. Click Update. A confirmation message displays.

2.2.5.14 Sourcing Budgets for Campaign Schedules

Securing funding for the cost of the Campaign Schedule is accomplished on the Budgets item of the side navigation.

Prerequisites

An existing Campaign with a Campaign Schedule.

Steps

1. Navigate to Campaign > Campaigns.
2. Click the Campaign link to display the Campaign Details Page.
3. Navigate to Execution > Campaign Schedule and select the appropriate Campaign Schedule.
4. Navigate to Planning > Budgets. The Estimated Budget for the Campaign is shown.
5. To request funding from a Budget, click Create Request and perform the following:

- a. Select a source type, either Budget or Person. If a person is selected, the person can allot funds from any of the budgets owned by that person.
- b. Click the search icon to display a list of available sources of the selected type.

The source code for the selected source along with the source's owner are filled in.

- c. The Budget Recipient section has been completed. The Request Date has also been completed with the current date.

- d. Select the requestor's name in the Required By field.
 - e. Enter a Requested Amount.
 - f. Enter a Holding Owner if the funding source is derived from a partner or a vendor.
 - g. Select a Transfer Reason: Initial Sourcing is the only one available.
 - h. Enter a Justification for the request.
 - i. Click Create.
6. The information entered will be summarized on the Budget page:
- a. Type. The Budget Source Type.
 - b. From/To. Indicates if funds are being drawn from a budget to the Offer or if funds are transferred to
 - c. Name. The Name of the budget or offer.
 - d. Amount. The Amount of the request or transfer.
 - e. Approved Amount. The amount of the request or transfer that was approved by the owner of the budget. The Approved Amount may not be as much as the Requested Amount.
 - f. Status. The status of the request.
 - g. Request Date. The date of the request.
 - h. Details. Click the icon in the Details column to view the details of the Budget Request or Budget Transfer.
 - i. Click Update in the Sourcing Details section to display the most current information.

2.2.5.15 Removing a Budget Request from a Campaign Schedule

If multiple sources of funding for a Campaign Schedule were requested and approved, not all of the sources may be required and some may be removed. If a budget source transfer has been entered and is no longer needed, it may be removed. Lines cannot be removed, however, once they are either approved, rejected, or are in the process of approval.

Prerequisite

An existing Campaign with a Campaign Schedule

Steps

1. Navigate to Campaign > Campaigns.
2. Click the Campaign link to display the Campaign Details Page.
3. Navigate to Execution > Campaign Schedule.
4. Select the appropriate Campaign Schedule.
5. Navigate to Planning > Budget.
6. Locate the Budget Source line to be removed.
7. Select the check box in the Remove column.
8. Click Update in the Sourcing Details section.

2.2.5.16 Transferring Funds from a Campaign Schedule to a Budget

Creating a Transfer returns budget funds to a budget. This is generally used to return a partial amount back to a budget.

Prerequisites

An existing Campaign with a Campaign Schedule

Steps

1. Navigate to Campaign > Campaigns.
2. Click the Campaign link to display the Campaign Details Page.
3. Navigate to Execution > Campaign Schedule.
4. Select the appropriate Campaign Schedule.
5. Navigate to Planning > Budgets.
6. To request a transfer of funds from the Campaign Schedule to a Budget, click Create Transfer and perform the following:
 - a. Select a Source Type.
 - b. Click the Search icon to display a list of recipients of the selected type.

The source code for the selected source along with the source's owner are filled in.

The request date has also been completed with the current date.
 - c. Enter the transferred amount.

- d. Enter a Holding Owner if the funding source is derived from a partner or a vendor.
 - e. Select a Transfer Reason: Initial Sourcing is the only one available. Enter a Justification for the request.
 - f. Click Create.
- 7. The information entered is summarized on the Budget page:
 - a. Type. The Budget Source Type.
 - b. From/To. Indicates if funds are being drawn from a budget to the Campaign Schedule or if funds are transferred to a budget
 - c. Name. The Name of the budget.
 - d. Amount. The Amount of the request or transfer.
 - e. Approved Amount. The amount of the request or transfer that was approved by the owner of the budget. The Approved Amount may not be as much as the Requested Amount.
 - f. Status. The status of the request.
 - g. Request Date. The date of the request.
 - h. Details. Click the icon in the Details column to view the details of the Budget Request or Budget Transfer.
 - i. Click Update in the Sourcing Details section to display the most current information.

2.2.5.17 Updating Campaign Schedule Budgets

Campaign Schedule Budget statuses and approvals may change while the details of the Campaign Schedule are being accessed.

Use this procedure to update the Budget information for an Campaign Schedule.

Note: The system will not add budget lines if the initial estimated budget is not first updated.

Prerequisites

An existing Campaign with a Campaign Schedule.

Steps

1. Navigate to Campaign > Campaigns.
2. If the desired Campaign is not displayed on the list, search for it by changing the View Type, or using by QuickFind or Personalized Search.
3. Click the Campaign name link to display the Campaign Details Page.
4. Navigate to Execution > Campaign Schedule.
5. Select the appropriate Campaign Schedule.
6. Navigate to Planning > Budget.
7. Click Update.

2.2.5.18 Removing a List from a Campaign Schedule Target Group

Use the following procedures to remove a list from a campaign schedule target group.

Note: You cannot remove lists from a target group that is associated with an active campaign schedule.

Prerequisites

A existing Campaign Schedule with a Target Group containing one or more Lists

Steps

1. From the Campaign Schedule Details Page, navigate to Execution > Target Group.
2. Select the checkbox in the Remove column of the List to be removed.
3. Click Update at the bottom of the page.
4. If the Target Group has been generated, click Generate Target Group to regenerate the Target Group without the List you removed.

2.2.5.19 Creating a Campaign Schedule Using Oracle Advanced Outbound

Use the following procedure to create a telemarketing campaign with Oracle Advanced Outbound

Prerequisites

- A list with names, phone numbers and DNC (Do not call) information
- An activity called Telemarketing
- A custom setup having a telemarketing activity
- A marketing medium (setup for Oracle Advanced Outbound)

Steps

1. Navigate to Campaign > Campaigns.
2. Click the Campaign name link.
3. Navigate to Execution > Campaign Schedule on the side navigation.
4. Click the appropriate link to edit an existing schedule or click Create a new schedule.
5. Select a Setup Type. The List of Values (LOV) comes from the information entered in Custom Setups by your DBA. Wait a moment after making a selection as the page will rewrite and complete fields specified in the Custom Setup.
6. Give the schedule a Name.
7. Select a Language
8. Select a Coordinator from the list of people within the organization.
9. Leave the Source Code blank. This will be filled in by the system.
10. Select a Marketing Medium
11. Select a currency, if desired.
12. Select a time zone.
13. Select Start and End Dates and enter Start and End Times.
14. Select an Objective.
15. Select a Priority.
16. Enter a description.

17. Trigger Details

- a.** Select Use Trigger if a trigger condition must be met for the Schedule to execute.
 - b.** Select the Trigger Condition
- 18.** Select a name for the Execute After Approval By field. This is required for schedules executed through Advanced Outbound.
- 19.** Select a name for the Send Notification To field. A notification will be send to this person when the trigger approval is given.

2.2.6 Creating and Managing Events

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

Procedures in this section include:

- [Section 2.2.6.1, "Creating an Event"](#)
- [Section 2.2.6.2, "Adding and Editing Information for an Event"](#)
- [Section 2.2.6.3, "Promoting an Event by Associating It with a Campaign"](#)
- [Section 2.2.6.4, "Searching for Events"](#)
- [Section 2.2.6.5, "Setting Up Event Registrations"](#)
- [Section 2.2.6.6, "Registering for an Event"](#)

2.2.6.1 Creating an Event

Use this procedure to create an event.

Prerequisites

None

Steps

- 1.** Navigate to Event > Events.
- 2.** Click Create. The Create Event page appears.

3. Select the type of event to create using the setup type drop-down list. Selecting a type determines which fields are presented. These types are set up by your administrator.
4. Enter a unique source code. Optionally, you can leave the source code field blank and the system will generate a unique code after the creation of the event.
5. Enter a name for the event according to naming conventions for your organization, if any.
6. Enter the start date and end date for the event.
7. Enter the duration of the event.
8. Enter a description of the event.
9. Click Create. The Event Details page appears.

2.2.6.2 Adding and Editing Information for an Event

Use this procedure to add or to edit details for an event.

Prerequisites

An existing event

Steps

1. Navigate to Event > Events.
2. Click the event name link to view or edit. The Event Details page displays.
3. Enter the budget currency.

Note: You may update the currency field at any time during the theme approval process. The currency field becomes uneditable after budget approval.

4. Select applicable check boxes:
 - Global
 - Confidential
 - Pass Attendees as Leads
 - Pass Registrants as Leads

5. Complete information for the items on the side navigation.

2.2.6.3 Promoting an Event by Associating It with a Campaign

Events may be promoted by associating the event with a campaign. Use the following procedure to associate the event with an existing campaign. You can also create a new campaign and associate the event from the Create Campaign page.

When attempting to link a campaign to an event, only campaigns of type “Event Promotion” are displayed in the LOV. If a campaign is created through an event it automatically creates a campaign of type event promotion.

Prerequisites

An existing campaign and an existing event.

Steps

1. Navigate to the Event Details page.
2. Click the Campaign attribute. The Event Details - Campaigns page appears.
3. Use the Campaign Name list of values (LOV) to select the campaign to associate with the event. You can also create a new campaign can also be created
4. Click Update.

2.2.6.4 Searching for Events

The following table lists the input search criteria for locating events, to begin the registration process.

Table 2–19 Event Search Criteria

Field	Description
Event Schedule Name	The name of the event for which you want to set up the registration process.
Source Code	The source code for the event for which you want to set up the registration process.

Table 2–19 Event Search Criteria

Field	Description
Event Type	The type of events you want to work with. Using this field, the system returns all current events with the given type. Examples include: ■ Briefing ■ Conference ■ Exhibition ■ Seminar
Start Date	The scheduled start date for the event.
End Date	The scheduled end date for the event.
Country	The country in which the event is being held.

To search for an event for registration purposes, complete the following steps.

1. Navigate to Event > Registrations.
2. Enter the search criteria for the event.
3. Click Search.

The search retrieves records of those event schedules which are active and whose end date and event registration end date are greater than present date and whose registration required flag is set to yes.

2.2.6.5 Setting Up Event Registrations

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

Prerequisites

An existing event schedule

Steps

1. Navigate to Event > Event Schedules.
2. Click an event schedule link to display the Event Schedules - Details page.
3. Click Registration Setup on the side navigation.
4. Enter the enrollment start and end dates.

5. Enter the minimum required registrants and the Attain Minimum By date, as appropriate. This data is for informational purposes only.
6. Enter the credit type and credits, as appropriate. Use these fields when the organization awards credits for attendance. This data is for informational purposes only.
7. Enter an action type and inventory number.
8. Click Update.
9. Enter the event pricing information in the table provided.
10. Click Update.

Note: When the event registration is setup, the event can be associated to an existing inventory item or a new inventory item can be created. This is through the select/create option for inventory.

2.2.6.6 Registering for an Event

Use the following procedure to register for an event.

Prerequisites

An existing event

Steps

1. Navigate to Event > Registrations.
2. Enter the search criteria for the event.
3. Click Search.

The search retrieves records of those event schedules which are active and whose end date and event registration end date are greater than present date and whose registration required flag is set to yes.

4. Click the Register link corresponding to the event for which you want to register. You can locate the Register link in the last column of the search results table.
5. Enter search information on any of the provided search criteria. A list of people falling under the defined search criteria appears.

6. Click the Register checkbox for all persons on the list that you want to register.
7. Click Submit.

2.2.7 Creating and Managing Event Schedules

Using Event Schedules functionality, you can:

- Create event agendas with multiple tracks and multiple sessions
- Create track and session details
- Print and download agendas
- Enter external resources for an event agenda and notify them using e-mail and update status based on response
- Manage resource availability by the hour rather than by the day

Procedures in this section include:

- [Section 2.2.7.1, "Creating an Event Schedule"](#)
- [Section 2.2.7.2, "Entering Event Schedule Details"](#)
- [Section 2.2.7.3, "Specifying the Invitation List for an Event Schedule"](#)
- [Section 2.2.7.4, "Entering Event Coordinators and Other Resources"](#)
- [Section 2.2.7.5, "Creating Event Agenda Tracks and Sessions"](#)
- [Section 2.2.7.6, "Sending e-Mail Notifications"](#)
- [Section 2.2.7.7, "Publishing Notes"](#)

2.2.7.1 Creating an Event Schedule

An event schedule tracks individually occurring events. It also records participation and enrollment. Use this procedure to create an event schedule.

Prerequisites

An existing event

Steps

1. Navigate to Event > Events Schedules.
2. Click Create.
3. Select a setup type. Use the LOV to select a valid type.

4. Enter the name of the event you are creating.
5. Enter the name of the associated event.
6. Enter a unique source code. This is an optional entry. If you do not define a source code, the application generates one upon the creation of the event schedule.
7. Enter a business unit.
8. Select the type of event.
9. From the setup type drop-down list, select the custom setup for the event. The custom setup is created by the application administrator and determines the type of information to track with an event schedule.
10. Make entries in other optional fields.
11. If the person responsible for this event is other than yourself, enter that person's name in the Owner field.
12. Click Create. The Event Schedule Details page appears.

2.2.7.2 Entering Event Schedule Details

Use this procedure to enter or modify details about an event schedule.

Prerequisites

An existing event schedule

Steps

1. Navigate to the Event Schedule Details page.
2. The source code field is automatically populated with the unique identifying code generated by the application for this event schedule.
3. Enter the budget currency.

Note: You may update the currency field at any time during the theme approval process. The currency field becomes uneditable after budget approval.

4. Use the Owner LOV to select and assign ownership of this event to someone else.

5. Enter the start and end dates when this event will be available for use.
6. Enter the duration of the event.
7. Select the venue where the event is to be held.
8. Make entries in other optional fields, as desired.
9. Select applicable check boxes:
 - Global
 - Confidential
 - Registration Required
 - Invite Only
 - Payment Required
 - Pass Attendees as Leads
 - Pass Registrants as Leads
10. Click Update.

2.2.7.3 Specifying the Invitation List for an Event Schedule

Use this procedure to specify the list of people to invite to an event schedule.

Note: Persons who are not on the invitation list for an “invite only” event can not register for the event.

Prerequisites

A list of invitees

Steps

1. Navigate to the Event Schedule Details page and select the Invite List item from the side navigation.

The Event Schedule Details - Invitation List page appears.
2. Use the list name list of values (LOV) to select the list name.
3. Click Generate Invite List.

2.2.7.4 Entering Event Coordinators and Other Resources

Resource roles are associated to the resources. Once you have a confirmed status other than cancelled, closed or archived, resources confirmed for a event schedule are not available to confirm any place else.

Also, you can create a venue either from the Administration tab or using the venue side navigation link under Events.

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

Prerequisites

- An existing event
- An established venue (created in administrative setup)

Steps

1. Navigate to Event > Event Schedules.
2. Click the link for the event on which you want to set up a resource.
3. Click the Resource side navigation link.
4. Select the resource type (role) to associate with the event.
5. Enter the resource's name.
6. Select a Status.
7. Enter a Start and End date
8. Click Update.

2.2.7.5 Creating Event Agenda Tracks and Sessions

If an event has multiple activities happening at the same time, you can split up the event agenda into separate tracks and sessions. Use this procedure to create event agenda tracks and sessions.

Prerequisites

An existing schedule

Steps

1. Navigate to the Event Schedule Details page.
2. Click the Event Agenda side navigation link.

To create a track:

- a. Click Create Track.
- b. Enter the Track Name, Description, and Coordinator.
- c. Click Create.

To create a session for this track, continue on with the following steps.

- d. Click Create Session.
- e. Complete the required fields.
- f. Click Create.

2.2.7.6 Sending e-Mail Notifications

As part of event e-mail notifications using Fulfillment Rules functionality, you can send an e-mail confirmation to the registrant after successful processing of the event registration.

You can also create default notifications using the Administration tab. You do have the ability to override these objects for individual event schedules using the functionality located within the Events tab. All changes made here, however, effect only the specific schedule with which you are working.

The following table lists the input fields and description.

Table 2–20 Fulfillment Rules

Field	Description
Object	The object on which you want to send a notification. Values include: ■ Claim ■ Campaign Schedule ■ Event Schedule ■ One Off Event

Table 2–20 Fulfillment Rules

Field	Description
Action	The action being taken requiring participant notification. The list of values vary depending on the type of object you select in the object column. For example: If you choose Campaign Schedule, actions values include: ■ Event Cancellation ■ Registration Confirmation ■ Venue Change ■ Registration Cancellation ■ Waitlist Confirmation ■ Event Date Change If you choose Claim, the only available action value is Closing Claim Notification.
Subject	Identifies the subject of the e-mail.
Cover Letter	Identifies the cover letter for the e-mail. You first create cover letters in Oracle Service Fulfillment, and then access them using the search icon.
Preview	Supports the viewing of the notification.

Steps

To send notifications to registrants, complete the following steps.

1. Navigate to Event > Event Schedules.
2. Click the event schedule link to access the event details.
3. Click Execution on the side navigation.
4. Click Fulfillment Rules.
5. Select an object, using the drop-down list. If the object you select is anything other than the default, the system immediately updates the object and provides values appropriate for your choice. The system takes a short time to refresh the screen before you are able to proceed to the next step.
6. Enter an action.
7. Enter a subject for the e-mail.

8. Select a cover letter, using the search icon.
9. Click Update.

2.2.7.7 Publishing Notes

Event Schedules and Campaign Schedules can have publishable notes. For Events, notes of type “venue information,” for example, give information about the execution of an event schedule related to the venue. This could include comments made by the event managers for other venue user to keep in mind. The venue information notes are available to all venue users.

Use this procedure to publish notes.

Prerequisites

None

Steps

1. Navigate to the object’s schedule details page.
2. Click the Collaboration side navigation link and then click Publishable Notes.
3. To view an existing note, click on the note link at the bottom of the page under the Note History heading.
4. To enter a note to be published:
 - a. Select an optional note type.
 - b. Enter the note text.
 - c. Click Create.

2.2.8 Creating and Managing Venues

Procedures in this section include:

- [Section 2.2.8.1, "Creating a Venue"](#)
- [Section 2.2.8.2, "Viewing and Editing Venue Details"](#)
- [Section 2.2.8.3, "Viewing and Modifying a Venue Room"](#)
- [Section 2.2.8.4, "Viewing and Modifying Venue Rates"](#)

2.2.8.1 Creating a Venue

Use the following procedure to create a venue.

Prerequisites

None

Steps

1. Navigate to Event > Venue.
2. Click Create.
3. Enter a name for the venue.
4. Enter the venue type and rating, using the drop-down lists.
5. Click the appropriate check boxes to indicate whether the event venue is internal and active.
6. Enter a brief description of the venue and the venue address.
7. Enter any planning information, and additional information which may prove useful to others.
8. Click Create.

Use the following procedure to modify the details of a venue room.

1. Navigate to Event > Venue.
2. Click the event name link to define all room details.
3. Click Venue Room on the side navigation.
4. Enter all available room details in the table shown.
5. Click Update.

2.2.8.2 Viewing and Editing Venue Details

To view and edit the details of an existing venue, complete the following steps.

Prerequisites

An existing venue

Steps

1. Navigate to Event > Venue.
2. Click the venue link for the venue you wish to modify.
3. Modify the Venue Details page input fields, as appropriate.
4. Click Venue Room, Venue Rates, and Associated Events, as appropriate for updating purposes.
5. Update the data in each of the areas, as appropriate.
6. Click Update after completing your updates for each page.

2.2.8.3 Viewing and Modifying a Venue Room

Use the following procedure to modify the details of a venue room.

Prerequisites

An existing venue room

Steps

1. Navigate to Event > Venue.
2. Click the event name link to view or edit.
3. Click Venue Room on the side navigation.
4. Modify room details as appropriate.
5. Click Update.

The rooms that have been created at the venue will be available at the event level if the session needs to be planned within a specific room.

2.2.8.4 Viewing and Modifying Venue Rates

Venue rates are informational rates based on the previous estimates or charges. Venue rates do not directly update costs of the event. Venue rates can include rates for catering, security, parking, etc. Room specific rates can be entered at the room level.

Use the following procedure to modify the details of venue rates.

Prerequisites

Existing venue rates

Steps

1. Navigate to Event > Venue.
2. Click the event name link to view or edit.
3. Click Venue Rates on the side navigation.
4. Modify rate details as appropriate.
5. Click Update.

2.2.9 Creating and Managing Products

Using this functionality, marketing personnel can easily access all product-related information and attributes required to better target, define, and manage marketing initiatives. This includes managing products and their price lists, tracking competitor products, and maintaining trade deals. It also provides a consolidated view of all marketing-related product information and the key ERP (Enterprise Resource Planning) decision-making variables from inventory, purchasing, sales and customer relationship management modules.

Note: Oracle Marketing supports access to the basic features of Oracle Inventory. Depending on your business practices, your organization may require you to set up further parameters in Oracle Inventory before the manufacturing and shipping of a product or bundle.

See the *Oracle Inventory User's Guide* for more information.

Procedures in this section include:

- [Section 2.2.9.1, "Creating a Product"](#)
- [Section 2.2.9.2, "Viewing Product Details"](#)
- [Section 2.2.9.3, "Modifying Product Detail Attributes"](#)
- [Section 2.2.9.4, "Modifying Inventory Options"](#)
- [Section 2.2.9.5, "Assigning Categories to Products"](#)
- [Section 2.2.9.6, "Assigning Organizations to Products"](#)
- [Section 2.2.9.7, "Adding Products to Price Lists"](#)
- [Section 2.2.9.8, "Creating Product Relationships"](#)
- [Section 2.2.9.9, "Creating Product Revisions"](#)
- [Section 2.2.9.10, "Bundling Products and Services"](#)
- [Section 2.2.9.11, "Specifying Products for a Product Bundle"](#)
- [Section 2.2.9.12, "Removing a Product from a Bundle"](#)
- [Section 2.2.9.13, "Creating a Competitor Product"](#)
- [Section 2.2.9.14, "Entering Competitor Products Details"](#)
- [Section 2.2.9.15, "Creating a Product Template"](#)
- [Section 2.2.9.16, "Modifying a Product Template"](#)

2.2.9.1 Creating a Product

Use this functionality to create either an individual product or service. The steps described in this section support you in creating both products and services.

The following table lists the input fields, and a description of each, available to you when you create a product.

Table 2–21 Product Creation Input Fields

Field	Description
Setup Type	Determines which side navigation items are recommended to create a new product or service. See the <i>Oracle Marketing Implementation Guide</i> for information on creating custom setup types.

Table 2–21 Product Creation Input Fields

Field	Description
Product or Service Radio Button	The marketer indicates if the product being created is a physical product or a service. This allows the application to filter products options attributes based on the type of product. The setting dictate the list of attributes displayed in the products options cue card
Product Name	A unique identifying name for the product.
Product Number	This field is a key flexfield that validates the product number entered. If users enter an invalid value, then they will directed to a page that lists the appropriate values for their implementation. For more detailed information, refer to the <i>Oracle Inventory User's Guide</i>.
Owner	The person who has responsibility for the product.
Master Organization Name	Indicates the master organization (also known as the “item master”) for the product. The value is the default value that is set for the AMS: Item Validation Master Organization profile option. See the <i>Oracle Inventory User's Guide</i> for more information on master organizations.
Product Type	Product Types are equivalent to User Item Types in Oracle Inventory. Therefore, they reflect the item types provided in Oracle Inventory and any item types created by your organization. See the <i>Oracle Inventory User's Guide</i> for more information on product types.
UOM (Unit of Measure)	The unit in which the quantity of an item is expressed. This value is the default value set for the INV: Default Primary Unit of Measure profile option. Note: Units of measure (UOM) are established and defined in Oracle Inventory. It is from there that all LOV (List of Values) options become available.
Description	A brief description of the product. This is an optional entry.
Creation Date	The system automatically generates a creation date. The creation date represents the day the product is created.

Prerequisites

An understanding of the organization's inventory practices and inventory numbering conventions

Steps

1. Navigate to Product > Products.
2. Click Create Product. The Create Product page appears.
3. Select a product type using the drop-down list.
4. You can create one of two different products. These include a physical product or a product consisting of services.
 - To create a physical product, click the Product radio button.
 - To create a service product, click the Service radio button.

Depending on which type of product you select, the system displays a corresponding set of attributes on the following attribute definition pages.

5. Enter a name for the product or service.
6. Enter an inventory part number for the product or service, following your organization's guidelines for creating inventory numbers.
7. Enter the name of the owner of the product. Use the search icon to view the available owner's names.
8. Select a unit of measure using the search icon.
9. Enter a product description.
10. Click Apply.

The Product Detail page appears. You can now define the product's attributes using the side navigation options.

2.2.9.2 Viewing Product Details

Use this procedure to display a product or product bundle.

Prerequisites

Existing products

Steps

1. Navigate to Product > Products.

2. Click a product link to display or modify the product details.

Note: You can sort the list by product name, number, UOM, type, owner, or organization. Click the respective column heading to perform the sort.

3. If the desired product is not on the list, select the Product Search link and search for the product.

2.2.9.3 Modifying Product Detail Attributes

The Main side navigation item supports the primary details for each product. You will find this item under the general category of Planning.

From this page you can define and modify basic product information. Listed in the following table are the product's definable fields and descriptions.

Table 2–22 Product Detail Attributes

Main	Description
Product Name	Name of the product. Use this feature to change the name of the product.
Status	This is a user-defined, information only field. The values listed are defined in Oracle Inventory. Any value placed in status has no functional value other than to provide additional information to the user.
Product Type	Product Types are equivalent to User Item Types in Oracle Inventory. Therefore, they reflect the item types provided in Oracle Inventory and any item types created by your organization. The LOV displays all user item types created in your Oracle Inventory database. See the <i>Oracle Inventory User's Guide</i> for more information on product types.
Description	A brief description of the product.

Note: Any information under the description box represent descriptive flexfields, as defined by your company, in Oracle Inventory.

Descriptive flexfields support the tracking of additional information, which may be significant to your organization.

To modify product detail attributes, complete the following steps.

Prerequisites

An existing product

Steps

1. Navigate to Product > Products.
2. Click the product link to display the product attributes you wish to modify.
3. Modify the product name, status, type, and description, as desired.
4. Click Apply.

2.2.9.4 Modifying Inventory Options

Use this procedure to modify an existing product or service.

Prerequisites

You can modify only products created within Oracle Marketing.

Steps

1. Navigate to Products > Products.
2. Click the product link for the product you wish to modify.
3. Click the Inventory Options side navigation link.
4. Select or de-select the desired inventory option check boxes.
5. Click Update.

2.2.9.5 Assigning Categories to Products

This feature supports you in assigning categories to your products. The categories are defined during installation. To request additional category sets, see your Database Administrator.

With this functionality, you can define multiple segment structures for the Item Category flexfield. The categories assigned to a category set must have the same flexfield structure as the set itself. You can define an unlimited number of categories in a category set.

The following table list the fields used to define assignments, and their descriptions.

Table 2–23 Category Assignments

Name	Description
Category Set	A distinct grouping scheme that supports users in reporting and inquiring on items, based on the user’s needed format. For example, the Sales and Marketing category set has 3 segments: ■ Interest Type (e.g., Computer Hardware) ■ Primary Code (e.g., Accessories) ■ Secondary Code (e.g., keyboard)
Description	A brief description of the category set.
Category	A logical classification of items with similar characteristics.

Use the following procedures to define category assignments for existing product.

Prerequisites

- An existing product
- The concurrent program “Load Inventory Category” must have been run during implementation.

Steps

1. Navigate to Product > Products.
2. Click the product link for the product you wish to modify.
3. Select Categories from the side navigation.
4. Enter a description, using the search icon.

- 5. Repeat steps 3 and 4 until you have entered all desired categories.
- 6. Click Apply.

2.2.9.6 Assigning Organizations to Products

Supports organization assignments for your products. From here, you assign the inventory organization and its unit of measure.

Table 2–24 Organization Assignments

Name	Description
Organization	The inventory organization where the item will be transacted.
Unit of Measure	Default unit of measure for transactions.

Use the following procedures to define organization assignments for existing product.

Prerequisites

An existing product

Steps

- 1. Navigate to Product > Products.
- 2. Click the product link for the product you wish to modify.
- 3. Select Organization Assignments from the side navigation.
- 4. Enter an organization using the search icon.
- 5. Enter a unit of measure using the search icon.
- 6. Repeat steps 3 and 4 until you have entered all desired organizations.
- 7. Click Update.

2.2.9.7 Adding Products to Price Lists

Use this procedure to add a product to one or more existing price lists.

Prerequisites

An existing product and price list

Steps

1. Navigate to the Product Detail page.
2. Select Price List from the side navigation.
3. Add the product to one or more price lists. To select a price list:
 - a. Click the search icon to select the price list.
 - b. Enter the price.
 - c. Click the search icon to select a Unit of Measure (UOM).
 - d. Enter the start date when the price becomes effective.
 - e. Optionally, enter an end date.
4. Click Apply.

The following table lists the input fields and a description of each.

Table 2–25 Price Lists

Field	Description
Name	The name of the price list.
Price	The base price at which you will sell the product, by unit.
UOM	The unit in which the quantity of an item is expressed. Example: ■ Each ■ Carton ■ Case ■ Box of 12 Note: Units of measure (UOM) are established and defined in Oracle Inventory.
Static Formula	Prior to order entry, you execute a concurrent process which calculates the list price.

Table 2–25 Price Lists

Field	Description
Dynamic Formula	When you enter an order the pricing engine uses the formula to calculate the list price.
Start Date	The date on which the price list becomes active.
End Date	The date on which the price list becomes no longer active.

2.2.9.8 Creating Product Relationships

The Related Products side navigation item supports the creation of relationships between your and other products. Input fields include:

Table 2–26 Related Products

Field	Description
Product Name	The name of the product you are relating.
Relationship Type	Identifies the type or effect of the relationship between your and related products. The available values of this field is based on the relationships set up in Oracle Inventory.
Reciprocal	Identifies whether the system will cross-reference your product with the related product. Toggle this checkbox to activate and deactivate the option.

To build a relationship between products, complete the following steps.

Prerequisites

Two existing products

Steps

1. Navigate to Product > Products.
2. Click the product link for the product you want to relate.
3. Click Related Products on the side navigation.
4. Click the desired product using the search icon next to the Product Name field.
5. Enter a relationship type, using the drop-down list.

6. Click the Reciprocal checkbox if you want the relationship activated on both products. Conversely, if you only want a one-way relationship, do not check this box.
7. Click Apply.

2.2.9.9 Creating Product Revisions

The application supports iterations of the same product. Each time you work on a revision, you are always working from the most current products. Use the Revisions functionality to build a history for each revision you make on the given product.

Note: The effective date of the revision must be a date after the current date in order for the system to accept your update.

Table 2–27 Product Revisions

Field	Description
Revision	The name of the revised product details.
Description	A brief description of the changes made.
Effective Date	The date the revision is to become effective.

To add details to the revision history, complete the following steps:

1. Navigate to Products > Product.
2. Click the product link for the product you want to revise.
3. Click Revisions on the side navigation.
4. Enter the name of revision.
5. Enter a description.
6. Enter an effective date for the revision.
7. Click Apply.

2.2.9.10 Bundling Products and Services

The bundling feature supports the creation of a product bundle by combining products with products, services and quantities.

Use the Product Detail Bundling screen to specify which products this product bundle will contain.

Note: Set the BOM allowed flag for this product bundle “Y”, as the systems stores the bundling specification you define in the bill of materials.

The following table lists the bundling input fields, and a description of each.

Table 2–28 Product Bundling

Field	Description
Item Sequence	Indicates the sequence in which product appears in the bundle.
Product Name	Indicates the name of the product being included.
Quantity	Indicates the quantity of the product to add to the bundle.

2.2.9.11 Specifying Products for a Product Bundle

Use this procedure to specify the products for a product bundle created within Oracle Marketing.

Prerequisites

- The products you wish to bundle must already exist in inventory.
- The product bundle must exist before adding the list of products.

Steps

1. Navigate to Product > Product.
2. Click the product link for the product you want to revise.
3. Click Bundling on the side navigation. The Product Detail - Bundling page displays.
4. Enter an item sequence.
5. Enter the product name, using the Search icon.

6. Enter the item quantity.
7. Repeat steps 3-5 until you list all products for inclusion.
8. Click Apply.

2.2.9.12 Removing a Product from a Bundle

You can use the Product Detail - Bundling page to initiate the removal of a product from a bill, but you must run the Delete Group concurrent program to remove it from the system and have your changes reflected on the Product Detail - Bundling page.

Prerequisites

- An existing product and bundle
- Ability to run concurrent programs in Oracle Applications

Steps

1. Navigate to Product > Product.
2. Click the Product link for the product you want to revise.
3. Click Bundling on the side navigation. The Product Detail - Bundling page displays.
4. Select the Remove checkbox and then click Apply.
5. Log in to Oracle Forms and select the Manufacturing and Distribution Manager responsibility.
6. Navigate to Bill of Material > Delete Group.
7. Select the organization to which the item belongs.
8. Enter the item to delete.
9. Click Check Group to ensure that the item can be safely deleted.
10. If the Check Group confirms that the item can be deleted, then click Delete Group. The item will now be removed from the bill on the Product Detail - Bundling page.

2.2.9.13 Creating a Competitor Product

You can create, view and update competitor product information from either the Product Tab (Competitor Product cue card) or from the Competitor Products tab.

The following table lists the input fields for creating a competitor product, with a description of each.

Table 2–29 Competitor Products

Field	Description
Competing Product Name	Indicates the name of the product you are associating as a competitive product. This can be either a product within your inventory, or the product of another vendor.
Competing Product Code	Indicates the product code for the product you are associating as a competitive product. This can be either a product within your inventory, or the product of another vendor.
Competing Party Name	Indicates the name of the owner of the competitive product.
Competitor URL	Indicates your competitor's URL, if available.

Use the following procedure to create a new competitor product from the Competitor side navigation link.

Prerequisites

- The product for which you are creating competitive information must already exist in inventory.
- The competitor name must already exist in the party table.

Steps

1. Navigate to Product > Products.
2. Click the product link for the product for which you want to you to show competitive information.
3. Click Competitor Product on the side navigation. The Product Detail-Competitor page displays.
4. Enter the name of the competing product.
5. Enter the product code for the competing product, if available.

6. Enter the name of the competing vendor. Use the Search icon to enter a valid name.
7. Enter the competitor's URL, if available.
8. Click Apply.

2.2.9.14 Entering Competitor Products Details

Use the following procedure to modify the details of a competitor's product.

Prerequisites

An existing competitor product

Steps

1. Navigate to Product > Products.
2. Click the product link for the product you want to modify.
3. Click Competitor Product on the side navigation. The Product Detail-Competitor page displays.
4. Enter competitor product details in the fields provided.
5. Click Apply.

2.2.9.15 Creating a Product Template

To create a new product template, complete the following steps.

Prerequisites

None

Steps

1. Navigate to Administration > Marketing > Setup > Product Option.
2. Click Create Product Template.
3. Enter a name for the template.
4. Click the Product or Service radio button to identify the template type.
5. Enter a description for the template.
6. Click Apply. The Product Template Details page appears.

7. Click the template name.
8. Enter the responsibility associated with the template, using the search icon.
9. Enter all product attributes applicable for the template, by clicking the appropriate check box.
 - a. Click “Select All” checkbox to make all the attributes of that section to be defaulted and editable.
 - b. Click the Default checkbox to default attributes used in that section.
 - c. Click the Editable checkbox to define which of the attributes should be editable from the Inventory Option page.

Note: Select All supersedes individually selected default and editable attributes in a section. Default and editable take precedence over hide.

10. Click Apply.

2.2.9.16 Modifying a Product Template

To modify a product template, complete the following steps.

Prerequisites

An existing template

Steps

1. Navigate to Administration > Marketing > Setup > Product Option.
2. Click the template name link for the product template you want to modify.
3. Modify responsibilities and attributes, as required.

Note: You can not modify the “Product Option For” (Product/Service) field when updating a template.

4. Click Apply.

2.2.10 Creating and Managing Offers

Procedures in this section include:

- [Section 2.2.10.1, "Creating Offers"](#)
- [Section 2.2.10.2, "Viewing and Editing an Offer"](#)
- [Section 2.2.10.3, "Offers Advanced Options"](#)
- [Section 2.2.10.4, "Associating Offers with a Campaign"](#)
- [Section 2.2.10.5, "Creating Offer Budgets"](#)

2.2.10.1 Creating Offers

Offers come in many different varieties. You can create product offer from the Products side navigation link or from the Campaign tab. Both pages use the same functionality. The following procedure details the basic information common to each offer type.

Prerequisites

None

Steps

1. Navigate to Campaign > Offers (or Products > Offers).
2. Click Create.
3. Select a setup type for the desired type of offer.
4. Enter information for all required fields. Optionally, enter information for the other fields listed.
5. Click Create. The Offer Details page displays.
6. Enter offer details including qualifiers and discount rules, as required.
7. Click Update.

2.2.10.2 Viewing and Editing an Offer

Use this procedure to view an offer and its various components.

Prerequisites

An existing offer

Steps

1. Navigate to Campaign > Offers (or Products > Offers).
2. If the desired Offer is not displayed on the list, search for it by changing the View Type, or by using Quick Find or Personalized Search.
3. Click the offer link. The Offer Details Page displays.
4. Edit the maintainable fields as needed.
5. Click Update.

2.2.10.3 Offers Advanced Options

Advanced Options are used to more precisely control pricing modifiers in Oracle Advanced Pricing. See Oracle Advanced Pricing documentation for more information.

Prerequisites

An existing offer

Steps

1. Navigate to the Offer Details page.
1. Select the Advanced Options side navigation link. The Offer Name, Start, and End Dates are displayed.
2. Select a phase.
3. Select Print on Invoice, if appropriate.
4. Select one of the Incompatible Group, if appropriate.
5. Select a Bucket.
6. Set the Level of Precedence, if appropriate.
7. Click Update to save your changes.

2.2.10.4 Associating Offers with a Campaign

Use this procedure to associate one or more existing offers with a campaign.

Prerequisites

None

Steps

1. Navigate to Campaign > Campaign.
2. Click the campaign name link.
3. From the side navigation, click Execution > Offers.
4. Click the search icon next to the Offer Name field to display a list of offers.
5. Select the desired offer and click Update.
6. To view the details of the offer, click the Offer Name link.
7. If a particular offer should take precedence over the rest of the offers associated with the campaign, select the Primary Flag check box.

2.2.10.5 Creating Offer Budgets

Securing funding for the cost of the Offer is accomplished on the Budgets item of the side navigation.

Prerequisites

An existing offer

Steps

1. Navigate to Planning > Budget.
2. Enter an Estimated Budget for the Offer.
3. Click the Update button underneath the Estimated Budget field. A Confirmation message will be displayed.
4. To request funding from a Budget, click Create Request and perform the following:
 - a. Select a Source Type, either Budget or Person. If you request funds from a Person, that person will select a budget during their response to the request notification.

- b.** Click the search icon to display a list of available sources of the selected type.
 - c.** The source code for the selected source along with the source's owner are filled in.
 - d.** The Budget Recipient section has been completed. The Request Date has also be completed with the current date.
 - e.** Enter a date and requested amount.
 - f.** Enter a Holding Owner if the funding source is derived from a partner or a vendor.
 - g.** Select a Transfer Reason: Initial Sourcing is the only one available.
 - h.** Enter a Justification for the request.
 - i.** Click Create.
- 5.** The information entered will be summarized on the Budget page:
 - a.** Type. The Budget Source Type.
 - b.** From/To. Indicates if funds are being drawn from a budget to the Offer or if funds are transferred to
 - c.** Name. The Name of the budget or offer.
 - d.** Amount. The Amount of the request or transfer.
 - e.** Approved Amount. The amount of the request or transfer that was approved by the owner of the budget. The Approved Amount may not be as much as the Requested Amount.
 - f.** Status. The status of the request.
 - g.** Request Date. The date of the request.
 - h.** Details. Click the icon in the Details column to view the details of the Budget Request or Budget Transfer.

2.2.11 Creating and Managing Price Lists

Procedures in this section include:

- [Section 2.2.11.1, "Creating a Price List"](#)
- [Section 2.2.11.2, "Displaying Price List"](#)
- [Section 2.2.11.3, "Editing an Existing Price List"](#)

2.2.11.1 Creating a Price List

Use this procedure to create a price list.

Prerequisites

None

Steps

1. Navigate to Product > Price Lists.
2. Click Create. The Price List Details window appears.
3. Enter a name for the price list.
4. Enter a price and unit of measure.
5. Enter static and dynamic information.
6. Enter a start and end date.
7. Click Create.

2.2.11.2 Displaying Price List

Use this procedure to display a price list. You can sort the list by clicking a link in the column headings.

Prerequisites

None

Steps

1. Navigate to Product > Price Lists.
2. By making a selection from the View drop-down list, you can view all price lists or restrict the view to the price lists you have created (My Price Lists).

2.2.11.3 Editing an Existing Price List

Use this procedure to add new products and prices or otherwise modify a price list.

Note: You can modify only price lists created within Oracle Marketing.

Prerequisites

An existing price list

Steps

1. Navigate to Product > Price Lists.
2. Click the price list name link.
3. Modify the price list information, as required.
4. Click Update.

2.2.12 Creating and Managing Budgets

Use the Budget tab to set up funding for campaign, offers, events, and deliverables. To draw funds from an existing budget, use the Budget item on the side navigation in the individual campaign, event, or deliverable.

Procedures in this section include:

- [Section 2.2.12.1, "Creating a Fixed Budget"](#)
- [Section 2.2.12.2, "Updating Market Eligibility for Fixed Budgets"](#)
- [Section 2.2.12.3, "Updating Products for Fixed Budgets"](#)
- [Section 2.2.12.4, "Creating Budget Requests from an Object"](#)
- [Section 2.2.12.5, "Creating Budget Requests from a Budget"](#)
- [Section 2.2.12.6, "Creating Budget Transfers from an Object"](#)
- [Section 2.2.12.7, "Creating Budget Transfers from a Budget"](#)
- [Section 2.2.12.8, "Viewing Budget Utilized"](#)
- [Section 2.2.12.9, "Reconciling a Budget"](#)
- [Section 2.2.12.10, "Viewing the Customer Checkbook"](#)
- [Section 2.2.12.11, "Viewing Budget Rollup"](#)

- [Section 2.2.12.12, "Adding a Budget Threshold"](#)
- [Section 2.2.12.13, "Activating a Budget"](#)
- [Section 2.2.12.14, "Deleting Budget"](#)
- [Section 2.2.12.15, "Copying a Budget"](#)

2.2.12.1 Creating a Fixed Budget

A fixed budget has a budget amount specified at the time of creation and activation.

- It can fund marketing activities such as campaigns, events and deliverables.
- Its budget amount can change by transfers and requests.
- It is active until a user manually closes it, even after the end date is reached.

In the application, a fixed budget is one that is created with Type = Fixed. Use the following procedure to create a fixed budget.

Prerequisites

A Set of Books must have been defined.

Steps

1. Navigate to Budget > Create.
2. Select a Setup Type. Setup Type in budget determines the available side navigation links. Setup Type also determines whether the budget is a fixed budget or a fully accrued budget. If you change the Setup Type, wait for the page to re-display with any default values.
3. Enter a Name for the budget.
4. Enter a Number or allow system to generate it. A number is a unique identifier for the budget.
5. Select business unit. Business units are organizations set up in Oracle Human Resources with Type = Business Unit. It is used here mainly for classification purpose. It can also affect the approval rule built for the budget.
6. Optionally select a parent budget name. Selecting a parent budget name will make that the current budget a child of the parent budget, thus establishing a budget hierarchy.

7. Type of the budget defaults from Setup Type. This can be either Fixed or Fully Accrued. To create a Fixed budget, verify that the value “Fixed” is defaulted here.
8. Select budget category. Budget categories are set up in Administration and can be used to classify the budget. If any GL accounts are associated, and if a profile for showing GL accounts on screen is set, those GL accounts will default on to the budget. In addition, an approval rule for a budget may use budget category as one of its criteria.
9. Enter budget amount. This is the amount of money set aside for this fixed budget.
10. Verify currency. By default the functional currency of the set of books used will be there. You may change it to another currency.
11. Optionally enter Holdback Amount. This is the amount which you would like to reserve and not allocate down to lower levels. A budget owner may choose to release the holdback amount at any time.
12. Verify the owner. By default the user entering the budget details will become the owner. Owner of a budget has all the update access to it.
13. Optionally enter start and end periods. These are set up to map to GL calendars and if selected, will limit the start and end dates.
14. Select Start Date.
15. Optionally select End Date.
16. Optionally enter any free form text to describe the budget in Description.
17. Click Create.

2.2.12.2 Updating Market Eligibility for Fixed Budgets

Use the following procedure to update market eligibility for fixed budgets.

Prerequisites

A draft fixed budget has been created.

Steps

1. Navigate to Budget.
2. Drill down into the fixed budget by clicking the budget Name.
3. Click the Market Eligibility side navigation link.

4. Select Eligibility Context. See [Section 2.1.8.2.2, "Market Eligibility"](#) for a description of possible values.
5. Select the Eligibility Name based on the Eligibility Context. (i.e., if Customer – Bill To was selected as the context, select a specific Customer – Bill To name here; if Buying Group was selected as the context, select a specific Buying Group name here, etc.)
6. Click Update.

2.2.12.3 Updating Products for Fixed Budgets

Use the following procedure to update products for a fixed budget.

Prerequisites

A draft fixed budget has been created.

Steps

1. Navigate to Budget.
2. Drill down into the fixed budget by clicking on the Name.
3. Click the Products side navigation link.
4. Product eligibility can be defined by selecting broad groups of products (category sets and categories) or by selecting specific products. A combination of the two can also be used. For example, users may select a particular category but exclude certain products within that category.
 - To select a Category, in the Product Family table, first select a Category Set. Category sets are groups of categories. Common category sets used include Inventory, Product Family, Sales and Marketing, etc.
 - To select a product, simply go to the Products table and search for the Product Number.

The different meaningful combinations are:

- Include Categories Only. For example, include a particular category called “Household Supplies” which contains multiple household supplies products within it.
- Include Categories and Products. For example, include a particular category called “Household Supplies” which contains multiple household supplies products within it, plus a product called “Industrial Cleaning

Solution” which does not fall into the “Household Supplies” category but is a product that the user wants to target the budget to as well.

- Include Categories, Include/Exclude Products. For example, include a particular category called “Household Supplies” but exclude a product within the category called “Discontinued Washing Detergent.”
- Include Some Categories, Exclude Some Categories. For example, include a bigger category called “New Products” but exclude a smaller category called “Household Supplies.”
- Include Some Categories, Exclude Some Categories, Include Products. For example, include a bigger category called “New Products” but exclude a smaller category called “Household Supplies”, and in addition include a particular product called “Discontinued Washing Detergent.”
- Include Some Categories, Exclude Some Categories, Exclude Products. For example, include a bigger category called “New Products” but exclude a smaller category called “Household Supplies”, and in addition exclude a particular product called “New Industrial Washing Detergent.”
- Include Products Only. For example, simply include a product called “New Industrial Washing Detergent.”

2.2.12.4 Creating Budget Requests from an Object

Use the following procedure to create a budget request for a marketing object.

Prerequisites

Access to the Budget Request page for the object

Steps

1. Navigate to and drill down into the marketing object. Click the Budgets side navigation link.
2. Verify that “Initial Budget Estimate” has been completed.
3. Click Create Request.
4. The Budget Request page is divided into three sections:
 - Source
 - * Source Type: The available values are Budget and Person. A user can either request money from a budget or from a person who will then in turn decide which budget will give the money out to the request.

- * Source Name: The available values here depend on the Source Type chosen above. If the Source Type = Person, then here a list of people will appear as the values. If the Source Type = Budget, then here a list of budget which the budget requestor has access to will appear. (Please review Budget Security concepts to understand under what circumstances will a user have what kind of access to a budget.).
- * Number: This will only appear if the Source Type = Budget. Once the budget is selected in Source Name, this will be automatically populated. This is the budget's number, i.e., its unique identifier.
- * Budget Amount: This will only appear if the Source Type = Budget. Once the budget is selected in Source Name, this will be automatically populated. This is the available amount of the budget.
- * Owner: This will only appear if the Source Type = Budget. Once the budget is selected in Source Name, this will be automatically populated. This is the budget's owner.
- Recipient
 - * Recipient Type: This is automatically populated based on the object type. For example, if the object is Campaign, then this is Campaign.
 - * Recipient Name: This is automatically populated based on the object's name. For example, if it is a campaign requesting budget, here you see the campaign's name. Drilling down into the name will take a user back to the main details page of the campaign.
 - * Number: This is automatically populated based on the object's number. For campaign, this is the campaign code.
 - * Owner: This is automatically populated based on the object's owner.
 - * Estimated Budget: This is automatically populated based on the initial budget estimate amount entered before the user clicks the Create Request button.
- Request Details
 - * Request Date: The date the request is created.
 - * Required By: For information only, a way to let the approver know the urgency of the request.
 - * Requested Amount: The amount of the budget request.

- * **Currency:** This defaults to the currency of the object. For example, if the offer is created in USD, then the currency here is USD.
- * **Holding Owner:** For information only, can be Partner or Vendor.
- * **Transfer Reason:** For information only, the reason of this budget request.
- * **Status:** The status of the budget request. It is initially Planning. Once approvers have approved it, it changes to Approved.
- * **Justification:** A short note to explain why the budget request is necessary or how the money will be used.

5. Click Create.

2.2.12.5 Creating Budget Requests from a Budget

Use the following procedure to create a budget request from a budget.

Prerequisites

Access to the Budget Request page

Steps

1. Navigate to Budget > Budget Transfers > Create Request.
2. The Budget Request page is divided into three sections:
 - **Source**
 - * **Source Name:** The available values here are always a list of budgets which the budget requestor has access to. (Please review Budget Security concepts to understand under what circumstances will a user have what kind of access to a budget.)
 - * **Number:** Once the budget is selected in Source Name, this will be automatically populated. This is the budget's number, i.e., its unique identifier.
 - * **Owner:** Once the budget is selected in Source Name, this will be automatically populated. This is the budget's owner.
 - * **Budget Amount:** Once the budget is selected in Source Name, this will be automatically populated. This is the available amount of the budget.
 - **Recipient**

- * Recipient Name: The name of the receiving budget.
- * Number: The number of the receiving budget.
- * Owner: The owner of the receiving budget.
- Request Details
 - * Request Date: The date the request is created.
 - * Required By: For information only, a way to let the approver know the urgency of the request.
 - * Requested Amount: The amount of the budget request.
 - * Currency: This defaults to the currency of the object. For example, if the offer is created in USD, then the currency here is USD.
 - * Holding Owner: For information only, can be Partner or Vendor.
 - * Transfer Reason: For information only, the reason of this budget request.
 - * Status: The status of the budget request. It is initially Planning. Once approvers have approved it, it changes to Approved.
 - * Justification: A short note to explain why the budget request is necessary or how the money will be used.

3. Click Create.

2.2.12.6 Creating Budget Transfers from an Object

Use the following procedure to create a budget transfer from a marketing object.

Prerequisites

- Access to the Budget Transfer page
- Both the granting and the receiving budgets are active

Steps

1. Navigate to and drill down into the object. Click the Budgets side navigation link and then click Create Transfer.
2. The Budget Transfer page is divided into three sections:
 - Source
 - * Source Type: Type of the object, e.g. Campaign.

- * Source Name: Name of the object, e.g. Campaign Name.
- * Number: Number of the object, e.g. Campaign Source Code.
- * Owner. This is the object's owner.
- * Estimated Budget: Approved budget for the object.
- Recipient
 - * Recipient Type: Budget.
 - * Recipient Name: Select the name of the budget to transfer money into.
 - * Number: This is the receiving budget's number.
 - * Owner: This is the receiving budget's owner.
- Transfer Details
 - * Request Date: The date the request is created.
 - * Transferred Amount: The amount of the budget transfer.
 - * Currency: This defaults to the currency of the object. For example, if the offer is created in USD, then the currency here is USD.
 - * Holding Owner: For information only, can be Partner or Vendor.
 - * Transfer Reason: For information only, the reason of this budget request.
 - * Status: The status of the budget request. It is initially Planning. Once approvers have approved it, it changes to Approved.
 - * Justification: A short note to explain why the budget request is necessary or how the money will be used.

3. Click Create.

2.2.12.7 Creating Budget Transfers from a Budget

Use the following procedure to create a budget transfer request from one budget to another.

Prerequisites

- Access to the Budget Transfer page
- Both the granting and the receiving budgets are active

Steps

1. Navigate to Budget > Budget Transfers > Create Transfer.
2. The Budget Transfer page is divided into three sections:
 - Source
 - * Source Name: Name of the granting budget.
 - * Number: Number of the granting budget.
 - * Owner: Owner of the granting budget.
 - * Budget Amount: Available amount of the granting budget.
 - Recipient
 - * Recipient Name: Select the name of the budget to transfer money into.
 - * Number: This is the receiving budget's number.
 - * Owner: This is the receiving budget's owner.
 - Transfer Details
 - * Request Date: The date the request is created.
 - * Transferred Amount: The amount of the budget transfer.
 - * Currency: This defaults to the currency of the object. For example, if the offer is created in USD, then the currency here is USD.
 - * Holding Owner: For information only, can be Partner or Vendor.
 - * Transfer Reason: For information only, the reason of this budget request.
 - * Status: The status of the budget request. It is initially Planning. Once approvers have approved it, it changes to Approved.
 - * Justification: A short note to explain why the budget request is necessary or how the money will be used.
3. Click Create.

2.2.12.8 Viewing Budget Utilized

For marketing purposes, the Budget Utilized column contains all costs posted to budget from marketing objects such as Campaigns and Events.

Use the following procedure to view utilized budgets.

Prerequisites

Access to view the budget.

Steps

1. Navigate to Budget.
2. Drill down into Budget Utilized by clicking on the number under the Utilized column.
3. The following data are displayed:
 - Activity Type: The available values are Campaign, Offer.
 - Activity Code: Either the code of a campaign or an offer.
 - Component Type: Campaign Schedule, or Offers which source from Campaign.
 - Component Code: Schedule source code, or Offer Code.
 - Document Customer: The customer on the document (i.e. an order or simply an adjustment). This is only populated if Activity Type = Offer.
 - Document Type: Order. This is only populated if Activity Type = Offer.
 - Document Number: Order number. This is only populated if Activity Type = Offer.
 - Document Date: Order date. This is only populated if Activity Type = Offer.
 - Adjustment Utilization Type: This can be Utilized, Accrual or Adjustment. It is Utilized for off invoice discounted amounts as well as costs from campaigns/events posted to the budget. It is Accrual for accrual offer amounts.
 - Adjustment Type: This is only populated if Utilization Type = Adjustment. Adjustment types may be created under Administration. Otherwise, seeded ones include Backdated_Offer_Adj-Decrease, Backdated_Offer_Adj-Increase, Volume_Offer_Adj-Decrease, Volume_Offer_Adj-Increase, Scan_Data_Adj-Increase and Reconcile_Unpaid-Decrease, Chargeback.

- Adjustment date: Date that the adjustment updates the budget.
- Utilization Amount in Different Currencies – Transaction Currency: This is the currency from an order transaction.
- Utilization Amount in Different Currencies – Budget Self Currency: This is the currency which the budget is created in.

2.2.12.9 Reconciling a Budget

Reconciliation is a way to return the following money at the end of a marketing activity. Budget reconciliation performs the following tasks:

- It adjusts previously committed, but un-utilized funds, transferring them from the Committed column to the Available column (“Reconcile Un-Utilized”)
- It 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”) This option is not currently applicable for marketing purpose.

The Reconcile button will only appear if the marketing activity’s end date has been reached and status is completed or closed, or if activity has no end date its status should be completed or closed.

Use the following procedure to reconcile a budget.

Note: The steps below use a Campaign as the example, but reconciliation can be performed for Events and Deliverables as well.

Prerequisites

Access to the Budget page of an object such as a campaign.

Steps

1. Navigate to Campaign.
2. Click the Budget side navigation link.
3. The Reconciliation section at the bottom of the page appears if one of the following is true:
 - End date of the campaign has past.
 - Offer status = Completed or Closed

4. Select a reconciliation option. There are two options are. The “Un-Utilized” is applicable for marketing purpose while the other one “Un-Utilized and Un-Paid Earnings” is not.

Un-Utilized:

- Un-Utilized amount = (Committed – Utilized).
 - During reconciliation, the budget’s committed amount will be reduced and its available amount will be increased accordingly. For example, an offer has committed = \$10K, utilized = \$8K. This kind of reconciliation will decrease the committed from \$10K to \$8K and increase the budget’s available by \$2K.
5. Click Reconcile.

2.2.12.10 Viewing the Customer Checkbook

The customer checkbook summarizes the main budget buckets by customer. Users can get to a customer checkbook by looking at the “Customer Budget View.” A profile option determines whether a user gets to see all customers’ budget view or simply those customers who belong to the budget the users owns.

Use the following procedure to view the customer checkbook.

Prerequisites

Access to the Budget.

Steps

1. Navigate to Budget.
2. Click Customer Budget View.
3. Optionally select View By. The options are:
 - My Customer: This looks at the customers inside only those budgets that the user has access to. The balances shown using this option are therefore only summed up for all the budgets which the user has access to.
 - All Customers: Based on a profile option, a user may get to see the total budget balances for all the customer budgets including those which he does not have access to.
4. Optionally search for a particular customer.

5. The following data are displayed:

- Customer.
- Currency: The budget's own currency.
- Total after Holdback: Total amount of the budget minus holdback amount.
- Planned: Total amount of not yet approved budget requests.
- Committed: Total amount of all approved budget requests.
- Recalculated Committed: The amount of commitment calculated based on actual utilization. If re-calculated committed is implemented, the amount here displays the real committed funds.
- Utilized: Amount that has been utilized or earned.
- Paid: Amount that has been paid.
- Balance: Total after Holdback – Committed

2.2.12.11 Viewing Budget Rollup

Use the following procedure to view a budget rollup.

Prerequisites

Access to the Budget.

Steps

1. Navigate to Budget.
2. Change View from Self View to Rollup View. The screen will refresh with rollup numbers.

2.2.12.12 Adding a Budget Threshold

Use the following procedure to add an existing budget threshold rule to an existing budget.

Prerequisites

Access to the budget

Steps

1. Navigate to Budget.

2. Drill down into a budget's name.
3. Search for and select the threshold rule set up under Administration.
4. Click Update.

2.2.12.13 Activating a Budget

After all the necessary information has been entered, a user can initiate the activation of a budget.

Use the following procedure to activate a budget.

Prerequisites

Access to the Budget

Steps

1. Navigate to Budget.
2. Drill down into the budget's name.
3. Click the Request Approval button.
4. Review the following details:
 - Name: Name of the budget.
 - Status: Status of the budget currently.
 - Approval Type: Budget.
 - Dates: Start and end dates of the budget.
 - Requestor: The user initiating the approval process. This may be the owner himself or simply a user who has access to the budget.
 - Owner: The owner of the budget.
 - Description: Description of the budget.
 - Approval Rule: The rule that is being used to route the budget to different approvers for approvals.
 - Request Status: The status, both in system status and in user status, that the budget will be in after approval.
 - Approver Details: A list of approvers.
5. Click Confirm.

2.2.12.14 Deleting Budget

Budgets in Draft, Cancelled, or Archived status can be deleted.

Use the following procedure to delete a budget.

Prerequisites

Access to the Budget

Steps

1. Navigate to Budget.
2. Drill down into the budget's name.
3. Click Delete.
4. Review detail.
5. Click Yes.

2.2.12.15 Copying a Budget

Use this procedure to create a new budget by copying information from an old budget.

Prerequisites

Access to the Budget

Steps

1. Navigate to Budget.
2. Click Copy.
3. Enter the Source Budget Name. This is the budget from which to copy.
4. Enter the New Budget Name. This is the copied budget.
5. Owner: This will become the owner of the new, copied budget. By default this is the user creating the copy.
6. Start Date: This will become the start date of the new, copied budget.
7. Select Copy Components:
 - Main
 - Market Eligibility

- Products
8. Click Copy.

2.2.13 Initiating Approvals

After creating an object (e.g., a campaign), marketers may need to submit the object for various types of approval (depending on the object approval requirements specified by your application administrator in Custom Setup Types).

All approvals in Oracle Marketing are gathered through the use of Oracle Workflow.

The Approval Process

1. When an approvable object is created, a Request Approval button is displayed. Approvals are initiated through the use of this button. However, users who do not have edit metrics will not be able to view the “Request Approvals” button.
2. The Request Approvals button takes the users to the Preview Approvals page. This page contains details of the approval type (i.e., Theme or Budget). This is based on the custom setup used for the object creation. The user can then modify the request status which is a list of the user statuses tied to the object status.
3. Once the request status is selected, the user can click the Confirm button. This initiates the approval process. The status returned upon approval is the status selected in the request status.
4. The object then changes status to “Pending” approval based on the approval initiated. If there is no approval rule, the notification for approval goes to the default marketing approver.
5. When the object is pending either theme or budget approval, the View Approval button is displayed on the object detail page. The View Approval button helps users to understand the status of the approval and the approval with whom the approval is pending. Clicking this button takes users to the 'View Approval Details' page which contains approver detail information.

In order to move an object from the active state to any other status, the process is manual. This is performed by updating the status and then clicking the Update button.

2.2.14 Creating and Managing Deliverables

Procedures in this section include:

- [Section 2.2.14.1, "Creating a Deliverable"](#)
- [Section 2.2.14.2, "Specifying Deliverables"](#)
- [Section 2.2.14.3, "Viewing and Editing a Deliverable"](#)
- [Section 2.2.14.4, "Creating a New Version of a Deliverable"](#)
- [Section 2.2.14.5, "Creating a Kit"](#)
- [Section 2.2.14.6, "Adding Associated Electronic Files to Deliverables"](#)

2.2.14.1 Creating a Deliverable

Use the following procedure to create deliverables.

Prerequisites

None

Steps

1. Navigate to Deliverable > Deliverable.
2. Click Create. The Create Deliverable page appears.

The following table lists all input fields with an explanation of each. An asterisk indicates each field requiring input.

Table 2–30 Deliverable Creation Input Fields

Field	Description
Setup Type	The setup type defines which options the system displays for attribute selection. Examples of setup types can include: ■ Deliverable ■ Attachments ■ Inventory Options ■ Kit Options A given setup type may also block a budget or costs option for certain electronic mediums which do not require budgeting.
Name	Input a unique name which clearly identifies the deliverable.

Table 2–30 Deliverable Creation Input Fields

Field	Description
Version	This is a method of tracking the deliverable’s most current update changes. Note: This feature does not provide a history of the modified attributes of each version, but instead, only the fact that various versions of the deliverable exist.
Language	Defines the valid language for campaigns and events referencing the collateral item.
Status	This field is available only when in the maintenance mode, as when you first creating a new deliverable, the default status is new. When modifying a deliverable, choose a status from the drop-down menu. These include: ■ Cancelled ■ New
Country	Defines the valid marketing geographic target for campaigns and events referencing the collateral item.
Category	Based on the selected setup type, the systems displays a set of categories in the Category menu. These categories are defined during setup, and created to catalog different types of collateral per setup type. Examples include: Events, E-mail, Direct Mail drops, Web promotions, and so on.
Sub Category	After selecting a category, the filtered set of subcategories is displayed, per category, to further narrow the collateral type for tracking. For example, if you choose the Event Category, the subcategories available are demo, event handout, giveaways, signage, staging, video.

Table 2–30 Deliverable Creation Input Fields

Field	Description
Delivery Medium	Define the storage and fulfillment of the item. - Physical items (hard collateral) are stocked manually or in Oracle Inventory. Physical items include brochures, CDs, promotional merchandise, and gifts to support campaigns, events, and sales leads. - Electronic items (soft collateral) are stored in Oracle Marketing and fulfilled via attachments. Note that only the attachments, not the master item itself, is fulfilled for electronic items. Electronic files include pdfs for a product such as data sheets and white papers, web content, creatives, e-mail blocks and mailing scripts to support your campaigns, events, and sales leads. Note that e-mail deliverables must be stored as electronic deliverables.
Start Period and End Period	Indicates planned dates for the deliverable. Once a period is entered, the dates are automatically entered based on the period dates. The objects can be used after creation and are available as long as they are active in the system. These dates are primarily for execution purposes. Active objects are available in other applications even if the end dates have passed.
Available From and Available To	The period in which the deliverable is available for use.
Due Date	The date the deliverable is due.
Last Updated	The automatically updates this field each time you modify an attribute.
Currency	The operating currency used for the deliverable.
Kit	Toggle for selecting and deselecting whether to include available kit options.
Owner	The user who enters the deliverable information is by default the Owner. You can edit this field.
Confidential	Indicates that the deliverable is unavailable for viewing to all members, other than your team, until the campaign is active. Once active, all other users can view the campaign.
Description	A brief description of the deliverable.

Table 2–30 Deliverable Creation Input Fields

Field	Description
Creation Date	The system automatically generates the Last Updated date. Once you click Create, the system posts the product owner’s name and creation date at the bottom of the page. Each time you add or modify an attributes, the system tracks and displays a history of the activity.

- 3. Select a setup type from the drop-down list.
- 4. Enter a unique name and version for the deliverable.

Note: Oracle Marketing does not maintain versions. A new version will overwrite the previous one.

- 5. Select a language, category, and sub category from the respective drop-down lists.
- 6. Select a delivery medium by clicking the appropriate radio button.
- 7. Enter the start period this deliverable.

This indicates planned dates for the deliverable.

Once a period is entered, the dates are automatically entered based on the period dates.The objects can be used after creation and are available as long as they are active in the system.

These dates are primarily for execution purposes. Active objects are available in other applications even if the end dates have passed.
- 8. Enter the date this deliverable will be available for use and the date this deliverable will no longer be available for use, respectively.
- 9. Enter the due date for this deliverable. This date must fall on or before the Available From date.
- 10. Select a country and currency.
- 11. Enter name of the owner of the deliverable. Click Go for a list of available resources.
- 12. Click Confidential to disallow viewing or editing of the deliverable.
- 13. Enter a description of the deliverable.

14. Click Update.

2.2.14.2 Specifying Deliverables

Use this procedure to specify either a physical or electronic deliverable for a campaign.

Prerequisites

None

Steps

1. Navigate to Planning > Deliverable.
2. To select an existing deliverable:
 - a. Select a Deliverable Type.
 - b. Click the search icon at the end of the Name field. Only Deliverables of the Type selected are displayed. Select a Deliverable.
 - c. Indicate the Quantity of the selected Deliverable. Note: Electronic Deliverables need only a Quantity of 1.
 - d. Indicate the Need By date.
 - e. Select Fulfill On.
 - f. Click Update.
3. Click Create.

2.2.14.3 Viewing and Editing a Deliverable

Use this procedure to view and edit an existing deliverable.

Prerequisites

An existing deliverable

Steps

1. Navigate to the Deliverable tab.
2. Click the link of the deliverable to view or edit it. If the desired deliverable is not displayed, search for it by changing the Saved Search or using QuickFind.
The Deliverable Details page displays.

3. Edit any information on the details page, with the exception of the version number.
4. Click Update.

2.2.14.4 Creating a New Version of a Deliverable

Use this procedure to create a new version of an existing deliverable.

Prerequisites

An existing deliverable

Steps

1. Navigate to the Deliverable tab.
2. Click the link of the deliverable to view or edit it. The Deliverable Details page appears.
3. Enter a new version number for the deliverable.

Note: Oracle Marketing does not maintain versions. A new version will overwrite the previous version.

4. Modify any editable fields as desired.
5. If the deliverable includes electronic files, modify those files by selecting the Attachment item on the side navigation and following the instructions for creating an attachment.
6. Fill in information in the other items on the side navigation.
7. Click Update.

2.2.14.5 Creating a Kit

You can bundle a set of physical and inventoried items or a set of electronic deliverables and attachments to create a kit of related collateral for a given promotion. You can use the deliverable in multiple kits, as long as an item is not a kit itself.

Note: Do not mix delivery mediums in the same kit.

Use this procedure to collect a number of deliverables into a kit. The kit itself must be created as a deliverable first before adding other deliverables to it.

Prerequisites

An existing deliverable

Steps

1. Navigate to Deliverable > Deliverable.
2. Select a deliverable from the listings.
3. Select the Kit? checkbox.
4. Click Update.
5. Select Deliverable Kit from the side navigation.
6. In the Kit section, select the deliverables that are a part of this kit:
 - a. Select the name of a deliverable from the Name list of values.

When the deliverable is referenced, the entire kit is fulfilled. Note that the kit is not stored as a kit in Oracle Inventory. The kit is stored as a marketing entity in Oracle Marketing.
 - b. Click Update.
 - c. Repeat this procedure for each deliverable in the kit.
7. Click Update.

For physical, inventoried kit items, if the kit is created and one piece of the kit is not in stock, any orders will be back ordered via Order Management and the kit will not be sent until all items are available. In that case, an order for individual kit components can be selected instead of the entire kit.

2.2.14.6 Adding Associated Electronic Files to Deliverables

There are two types of electronic files available for deliverables:

- Electronic
- E-mail

Use the following procedures to add electronic and e-mail (respectively) attachments to your deliverable.

For electronic deliverables (non e-mail):

The content of the electronic deliverable is specified in the Attachments side navigation item for the deliverable. For electronic deliverables, the attachments that comprise the master deliverable are fulfilled to customers (once the deliverable becomes available).

1. Navigate to Deliverable > Deliverable.
2. Click the Deliverable name link.
3. Click Attachments from the side navigation.
4. Click Create to display the Attachment management window. You can upload content from a file, enter text, or enter a URL for web content.
5. Enter a description for the content.
6. Click Create to return to the central Attachments window. The attachment date, description, name, type, and user name is displayed for tracking.

You can enter one or more attachments to support your product or solution campaigns, events, and sales leads.

Click the Description hyperlink to open the Attachment Details screen. This enables you to modify the attachment. For Attachments of type File, you can modify the file directly, and then upload the modified file. This will overwrite the previous version.

You can preview each of your attachments by clicking on the Attachment name. Oracle One-to-one Fulfillment is used to fulfill electronic deliverables with attachments via e-mail.

For electronic deliverables (category e-mail):

You specify the content of an electronic deliverable for an e-mail body in the E-mail Content side navigation link for the deliverable. Use this to store corporate

positioning statements, feature lists, benefits, or standard offering statements which can be used in multiple e-mails.

Note: The E-mail Content side navigation link can be seen only if the deliverable is created with custom setup of Activity Type “E-mail.”

From the E-mail Content screen, select a delivery type of HTML or text.

You can select the content for the e-mail from a URL or file. This populates the e-mail body with a set of text you can modify. You can enter html or text content, or images. Note that the images must be http images. Embedding static local images is not supported.

You can also import an existing e-mail block. This populates the e-mail body with a set of text you can modify, or Enter text directly in the e-mail body. Only the body of the e-mail is specified. The sender, return to, subject line, and greeting text of the e-mail is customized at the e-mail blast level. The target group and relevant offers are specified at the e-mail blast level as well.

You can preview the e-mail content by clicking Preview before activating the e-mail for campaign usage.

E-mail content can be referenced in one or more e-mail schedules so the content need not be created per e-mail blast.

Stocking Physical Deliverables

If you create a physical deliverable, you need to either:

- Stock the deliverable manually, or
- Associate the deliverable with Oracle Inventory.

Select the Inventory Options cue card entry and select to stock the deliverable manually or associate the deliverable with Oracle Inventory.

Table 2–31 *Inventory Options for Deliverables*

Option	Description
Stock Manually	Stock Manually. This can be useful for small deliverables which are mailed directly by the person receiving the request. If you stock the deliverable manually, enter the quantity of the deliverable you stock. These must be manually tracked and will not be tracked by Oracle Inventory.

Table 2–31 Inventory Options for Deliverables

Option	Description
Inventory Item	Inventory Item: You can add the deliverable to Oracle Inventory, or associate the deliverable with an existing item in inventory. Inventoried deliverables are handled like any other order for a part; ordered through Quoting and fulfilled through Order Management.

Attachments for physical deliverables are for collaboration only, and do not represent the deliverable content itself, which is physically stocked and fulfilled.

2.2.15 **Creating and Managing Messages**

Procedures in this section include:

- [Section 2.2.15.1, "Creating a Message"](#)
- [Section 2.2.15.2, "Removing a Message From Use"](#)
- [Section 2.2.15.3, "Viewing and Editing a Message"](#)

2.2.15.1 Creating a Message

The following table lists each of the fields used in creating a message, with a description. You can use this table to help you populate the input fields on the Create Message page.

Table 2–32 Message Creation Input Fields

Field	Description
Name	An identifying name for the message.
Type	The message type.
Date Effective From	The date the message becomes active.
Date Effective To	The date the message ceases to be usable.
Owner	The person who has ultimate responsibility for the message.
Country	The country in which the message is available.

Table 2–32 Message Creation Input Fields

Field	Description
Active	Indicates that the message is currently active. Note: While a message may be active, it may not necessarily be effective. See the Date Effective From and Date Effective To fields for effective dates.
Description	A brief description of the message.

Use the following procedure to create a message for use with marketing objects.

Prerequisites

None

Steps

1. Navigate to Deliverable > Messages.
2. Click Create. The Create Message page appears.
3. Enter the message name.
4. In the Effective Dates field, enter the dates this message is available.
5. Select the message type.
6. If desired, change the message owner.
7. Enter a description of the message.
8. Click Create. The Message Details page appears.
9. Fill in information in the various side navigation item pages. Click a link in the side navigation to display the appropriate page. Entering information on an item's page will cause a checkmark to be displayed to the left of the item indicating that information has been entered on that page.

2.2.15.2 Removing a Message From Use

Use this procedure to remove a marketing message from use.

Prerequisites

An existing message

Steps

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

The message can no longer be used with marketing objects.

2.2.15.3 Viewing and Editing a Message

Use this procedure to view and edit a message.

Prerequisites

An existing message

Steps

1. Navigate to the Message tab.
2. Select the link for the desired message. The Message Details page appears.
3. Edit the details as appropriate.
4. Click Update.

2.2.16 Creating and Managing Programs

Programs are an umbrella object used to combine different Campaigns, Events, Deals, Promotions and other objects into one entity. In this way, a new product launch may have events, campaigns, promotions, advertising, trade management deals and more coordinated from one point in Oracle Marketing.

Procedures in this section include:

- [Section 2.2.16.1, "Creating a Program"](#)
- [Section 2.2.16.2, "Viewing Programs"](#)
- [Section 2.2.16.3, "Selecting Program Components"](#)
- [Section 2.2.16.4, "Selecting a Program Message"](#)
- [Section 2.2.16.5, "Removing a Message from a Program"](#)

2.2.16.1 Creating a Program

Use the following procedure to create a program.

Prerequisites

None

Steps

1. Navigate to Campaign > Programs.
2. Click **Create**.
3. Enter the program name.
4. Enter the program parent, using the search icon.
5. Enter a short name for the program and a business unit and purpose.
6. Enter an owner using the search icon. The Owner field defaults to the person who logs into the application.
7. Select the start period, start and end dates, and a currency.
8. Click the Global checkbox, as appropriate.
9. Select a country for the program.
10. Click the Confidential checkbox if the program should not be viewed by others.
11. Enter a description.

12. Click Create to create the program.

2.2.16.2 Viewing Programs

Programs are an umbrella object used to combine different Campaigns, Events, Deals, Promotions and other objects into one entity. In this way, a new product launch may have events, campaigns, promotions, advertising, trade management deals and more coordinated from one point in Oracle Marketing.

If any of the components shown on the Program Tree is a Program, you can display its components by clicking the plus sign (+) next to the Program Name.

Use the following procedure to view a program.

Prerequisites

An existing program

Steps

1. Programs are listed on the Programs Summary Page with the Program Name, Short Name, Parent, Status, Start and End Dates.
2. To view the Hierarchy of the Program, click the icon in the View Hierarchy column.
3. The Program Tree page displays the following:
 - a. Name of component. To view the component's details, click the Link in the Name column.
 - b. Type of component.
 - c. The component's Source Code.
 - d. The Program the component belongs to.
 - e. The component's status.
 - f. The component's Start and End Dates.
4. To view the Program's details, click the link in the Name column.

2.2.16.3 Selecting Program Components

Use this procedure to add various marketing objects to a Program. Components include campaigns, events, and one-off events.

Prerequisites

An existing Program

Steps

1. Navigate to Campaign > Programs.
2. Click the program link to view or edit. The Program Details Page displays.
3. Navigate to Planning > Components.
4. Select a component type.
5. Enter a program name, using the search icon.
6. Click Update to update the remaining columns.

2.2.16.4 Selecting a Program Message

Use the Message item on the side navigation to associate a marketing message with a program. Marketing messages can refer to products, products families or organizational vision.

Prerequisites

An existing message

Steps

1. Navigate to Campaign > Programs.
2. Click a program link to display the Program Details page.
3. Navigate to Planning > Message. The Message page displays.
4. Select a message type.
5. Select a message using the search icon.
6. Click Update. The system displays a confirmation message.

2.2.16.5 Removing a Message from a Program

Use the following procedure to remove a message from a program.

Prerequisites

None

Steps

1. Navigate to Campaign > Programs.
2. Click the program name link to view or edit. The Program Details Page displays.
3. Navigate to Planning > Message.
4. Click the checkbox in the Remove column next to the Message to be removed.
5. Click Update. The system displays a confirmation message.

2.2.17 Creating Click-Through Destinations

Procedures in this section include:

- [Section 2.2.17.1, "Creating e-Mail Click-Through Destinations"](#)
- [Section 2.2.17.2, "Creating Web Advertisement Click-Through Destinations"](#)
- [Section 2.2.17.3, "Creating Web Offers Click-Through Destinations"](#)

2.2.17.1 Creating e-Mail Click-Through Destinations

To create a CTD for e-mail follow the procedure below.

Prerequisites

- The AMS : Enable Fulfillment profile option is set to Yes
- Templates are implemented as described in the *Oracle Marketing Implementation Guide*
- Queries are implemented as described in the *Oracle Marketing Implementation Guide*
- A Campaign for e-mail has been 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 - E-mail.
This selection will cause the application to automatically populate the Activity Type to Direct Marketing and the Activity to E-mail.
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 - E-mail 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 select the flashlight icon.
The Query selector will launch, enabling you to select 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 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 sourcecode (schedule source code) fields. For more information about creating Queries see the *Oracle Marketing Implementation Guide*.

11. In the e-mail content creation box, create the e-mail content.

If using IE: Highlight the text (to be used in the link), select the hyperlink icon in the iFrame content creation box. 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: 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, using the textbox content creation frame, replace the text "Use Proper Anchor Text" to a more user friendly description of the link such as "Click Here" (see below).

12. Select Update to save your work.

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

2.2.17.2 Creating Web Advertisement Click-Through Destinations

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

Prerequisite

- A Campaign for web advertisement 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 Type chosen in step 8.
10. 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.
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, and 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 selected in step 8.
 15. Select Preview.
A Preview window opens displaying either the image or text selected for the web advertisement.

2.2.17.3 Creating Web Offers Click-Through Destinations

Use the following procedure to create a CTD for web offers:

Prerequisite

- An offer of type “web offer” has been created
- 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 3. 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.

2.2.18 Working with Triggers

Procedures in this section include:

- [Section 2.2.18.1, "Creating a Campaign Trigger"](#)
- [Section 2.2.18.2, "Viewing Campaign Triggers"](#)
- [Section 2.2.18.3, "Removing a Campaign Trigger"](#)
- [Section 2.2.18.4, "Creating a Metric to Value Trigger"](#)
- [Section 2.2.18.5, "Creating a Metric to Workbook Trigger"](#)
- [Section 2.2.18.6, "Creating a Metric to Metric Trigger"](#)
- [Section 2.2.18.7, "Associating a Trigger to a Campaign Schedule"](#)

2.2.18.1 Creating a Campaign Trigger

Use the following procedure to create a campaign trigger.

Prerequisites

- An existing campaign
- An existing metric

Steps

1. Navigate to Campaign > Campaigns.
2. If the desired Campaign is not displayed on the list, search for it by changing the View Type, or using by QuickFind or Personalized Search.
3. Click the Campaign name link to display the Campaign Details Page.
4. Navigate to Execution > Trigger.
5. Click Create.
6. Enter a Name for the Trigger.
7. Select a Type for the Trigger. Each Trigger Type has its own Condition section. The Create Trigger page will re-display, showing the appropriate Condition section, after a Type is selected.
 - a. Metric to Metric: Compares one Metric value to another Metric value. If the comparison meets the specified condition, the Trigger executes any associated Campaign Schedule.

- b.** Metric to Value: Compares a Metric value to a manually entered value. If the comparison meets the specified condition, the Trigger executes any associated Campaign Schedule.
 - c.** Metric to Workbook: Compares a Metric value to a single value generated by a Discoverer Workbook, such as the number of college educated customers. If the comparison meets the specified condition, the Trigger executes any associated Campaign Schedule.
- 8.** Enter a Description.
- 9.** Complete the Monitor Setup section:
 - a.** Select a Time Zone for the Trigger.
 - b.** Enter Start and End Dates.
 - c.** Enter a Testing Interval and select from: Days, Hours, Months, Quarters, Weeks, Years, or None.
- 10.** Complete the Trigger Condition section according the appropriate procedure.

2.2.18.2 Viewing Campaign Triggers

Use the following procedure to view campaign triggers.

Prerequisites

An existing campaign

Steps

- 1.** Navigate to Campaign > Campaigns.
- 2.** If the desired Campaign is not displayed on the list, search for it by changing the View Type, or using by QuickFind or Personalized Search.
- 3.** Click the Campaign link to display the Campaign Details Page.
- 4.** Navigate to Execution > Trigger.
- 5.** Triggers are displayed on the Campaign Details - Trigger page with:
 - a.** Trigger Name.
 - b.** Trigger Type: Metric to Metric, Metric to Value or Metric to Workbook.
 - c.** Start and End Dates.
 - d.** Testing Interval (Every).

- e. Frequency: Days, Hours, Months, Quarters, Weeks, Years, or None.
- 6. Click the Trigger Name link to display the Trigger Details and Conditions.

2.2.18.3 Removing a Campaign Trigger

Use the following procedures to remove a campaign trigger.

Prerequisites

An existing Campaign with a Trigger

Steps

1. Navigate to Campaign > Campaigns.
2. If the desired Campaign is not displayed on the list, search for it by changing the View Type, or using by QuickFind or Personalized Search.
3. Click the Campaign name link to display the Campaign Details Page.
4. Navigate to Execution > Trigger.
5. Select the check box in the Remove column of the appropriate Trigger.
6. Click Update. The system displays a confirmation message.

2.2.18.4 Creating a Metric to Value Trigger

Use this procedure to create a trigger that compares a metric with a specific value. For the condition, you can specify the object type (Campaign, Campaign Schedule, Event or Event Schedule), the metric name (associated metrics), metric type (Actual or Forecasted Value), the condition and the value being compared.

Prerequisites

- A Metric associated with a Campaign, Campaign Schedule, Event or Event Schedule
- An existing campaign

Steps

1. Navigate to the Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Execution > Trigger from the side navigation to view the triggers associated with the Campaign.

4. Click Create to create a new Campaign Trigger.
5. Enter a name for the Trigger.
6. Select Metric to Value from the Type drop-down list. The page is refreshed with the corresponding condition section for Metric to Value Type.
7. Provide a brief description for the Trigger.
8. In the Monitor Setup section, provide the setup parameters for the Trigger. Provide a Start Date and End Date for the Trigger. In the Every field, provide the frequency for checking the trigger condition. The trigger condition is periodically evaluated based on Start Date and frequency.
9. In the Conditions section, select an Object Type for the Metric. Values include Campaign, Campaign Schedule, Event, Event Schedule.
10. Click the Search icon to select an object for the Object Type.
11. Select a Metric associated with the Object.
12. Select the Metric Type (Actual Value or Forecast Value) to be compared.
13. Select a comparison operand from:
 - Equal To (=)
 - Not Equal To (!=)
 - Less Than (<)
 - Less Than or Equal To (<=)
 - Greater Than (>)
 - Greater Than or Equal To (>=)
14. Enter a Value. The Metric will be compared with this value.
15. Click Create to create the Trigger.

2.2.18.5 Creating a Metric to Workbook Trigger

Use this procedure to create a trigger that compares a metric with a Discoverer Workbook that generates a single value. For the condition, you can specify the object type (Campaign, Campaign Schedule, Event or Event Schedule), the metric name (associated metrics), metric type (Actual or Forecasted Value), the condition and the value being compared.

Prerequisites

- A Metric associated with a Campaign, Campaign Schedule, Event or Event Schedule
- An existing campaign
- A Discoverer Workbook generating a single value

Steps

1. Navigate to the Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Execution > Trigger from the side navigation to view the triggers associated with the Campaign.
4. Click Create to create a new Campaign Trigger.
5. Enter a name for the Trigger.
6. Select Metric to Workbook from the Type drop-down list. The page is refreshed with the corresponding condition section for Metric to Workbook Type.
7. Provide a brief description for the Trigger.
8. In the Monitor Setup section, provide the setup parameters for the Trigger. Provide a Start Date and End Date for the Trigger. In the Every field, provide the frequency for checking the trigger condition. The trigger condition is periodically evaluated based on Start Date and frequency.
9. In the Conditions section, select an Object Type for the Metric. Values include Campaign, Campaign Schedule, Event, Event Schedule.
10. Click the Search icon to select an object for the Object Type.
11. Select a Metric associated with the Object.
12. Select the Metric Type (Actual Value or Forecast Value) to be compared.
13. Select a comparison operand from:
 - Equal To (=)
 - Not Equal To (!=)
 - Less Than (<)
 - Less Than or Equal To (<=)
 - Greater Than (>)

- Greater Than or Equal To ($\geq$)
14. Click the Search icon to the right of the Workbook Name field. Select an available Workbook from the list.
 15. Click Create to create the Trigger.

2.2.18.6 Creating a Metric to Metric Trigger

Use this procedure to create a trigger that compares a metric with another metric. For the condition, you can specify the object type (Campaign, Campaign Schedule, Event or Event Schedule), the metric name (associated metrics), metric type (Actual or Forecasted Value), the condition and the value being compared.

Prerequisites

- Two existing metrics associated with a Campaign, Campaign Schedule, Event or Event Schedule
- An existing campaign

Steps

1. Navigate to the Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Execution > Trigger from the side navigation to view the triggers associated with the Campaign.
4. Click Create to create a new Campaign Trigger.
5. Enter a name for the Trigger.
6. Select Metric to Metric from the Type drop-down list. The page is refreshed with the corresponding condition section for Metric to Metric Type.
7. Provide a brief description for the Trigger.
8. In the Monitor Setup section, provide the setup parameters for the Trigger. Provide a Start Date and End Date for the Trigger. In the Every field, provide the frequency for checking the trigger condition. The trigger condition is periodically evaluated based on Start Date and frequency.
9. In the Conditions section, select an Object Type for the first Metric. Values include Campaign, Campaign Schedule, Event, Event Schedule.
10. Click the Search icon to select an object for the Object Type.

11. Select a Metric associated with the Object.
12. Select the Metric Type (Actual Value or Forecast Value) to be compared.
13. Select a comparison operand from:
 - Equal To (=)
 - Not Equal To (!=)
 - Less Than (<)
 - Less Than or Equal To (<=)
 - Greater Than (>)
 - Greater Than or Equal To (>=)
14. Repeat steps 9 through 12 for the second metric.
15. Click Create to create the Trigger.

2.2.18.7 Associating a Trigger to a Campaign Schedule

After creating a trigger at the campaign level, you can then associate this trigger to any campaign schedule under this campaign. For associating the trigger at the campaign schedule, you can specify the trigger details that include trigger condition (name of the trigger set up at the campaign), approval and notification for this trigger.

Prerequisites

A trigger created within the Campaign section

Steps

1. Navigate to Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Select Create to create a campaign schedule.
5. Within the Trigger Details section, check the Use Trigger option.
6. Select the Trigger Condition from the drop-down list. The drop-down list displays the triggers created at the campaign level.

7. You can optionally specify the approver who would approve the campaign schedule execution when the trigger condition is met. You can enter this information in Execute After Approval By.
8. You can also optionally send a notification to an individual when the trigger condition is met. You can enter this information in Send Notification To.
9. Enter other information required for the Campaign Schedule.
10. Click Create to create the Campaign Schedule with the associated Trigger.

2.2.19 Associating and Managing Metrics, Costs and Revenues

This section includes user procedures for Metrics, Costs and Revenues for the following marketing objects:

- [Campaigns](#)
- [Campaign Schedules](#)
- [Programs](#)
- [Events](#)
- [Event Schedules](#)

Campaigns

2.2.19.1 Associating Campaign Metrics

Use the following procedure to associate an existing metric with a campaign.

Prerequisites

The required Metric must be set up by the system administrator.

Steps

1. Navigate to the Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Select Track > Metrics from the side navigation to view all the Metrics associated with the Campaign.
5. Within the Create New section of the Metrics Details page, click the Search icon to display a list of available Metrics. Select a Metric from the list.

- 6. Enter the Forecast and Actual values in their respective columns. Optionally, select a Transaction Date and enter a Description. The Transaction Date is a reference for you. It is not used within the metrics logic.
- 7. Select Create. The selected Metrics is now associated with the Campaign and will show up in the Metrics section.
- 8. Select Refresh to see the newly provided Metric values (for Actual or Forecast, step 5) calculated in the Summary or Rollup Metrics for this Campaign.

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.2 Viewing Associated Campaign Metrics

Use the following procedure to view a metric associated with a campaign.

Prerequisites

An existing marketing campaign with an associated Metric

Steps

- 1. Navigate to the Campaign Overview page.
- 2. Click on the link for the corresponding campaign.
- 3. Select Execution from the side navigation.
- 4. Select Track > Metrics from the side navigation to view all the Metrics associated with the Campaign.
- 5. Select a View Option and click Go. The following table describes the available view options. By default, Details is selected.

Table 2–33 Campaign Metrics View Options

View Option	Description
Details	View all Metrics associated with the Campaign. Summary Metrics are represented hierarchically and have Rollup, Manual and/or Function Metrics that define a summarization as leaf nodes of the Summary Hierarchy.
Input Only	View only manually entered metrics. This is the best option for the user to enter forecast and actual metric values.

Table 2–33 Campaign Metrics View Options

View Option	Description
Function Only	View only metrics based on PL/SQL procedures and functions. The user can only input forecast values with this option.
Rollup Only	View only Metrics that are rolled-up from lower levels in the marketing object hierarchy. You cannot input any data in this option.

6. Summary metrics are displayed with the option to expand the Summary Hierarchy. Select the plus sign (+) to view the next level of detail in the hierarchy. New row(s) appear detailing the individual metrics that compose the hierarchy.
7. Based on the Metrics type, you can enter the Actual and/or Forecast Values for the Metrics. For a Manual Metrics you can enter the Actual Values and the Forecast Values (provided the Campaign is not yet active). For a Function Metrics you can enter the Forecast Values (provided the Campaign is not yet active).
8. Select Update to save your changes.
9. Select Refresh to see the newly created Metric values (for Actual or Forecast) calculated in the Summary or Rollup Metrics for this Campaign.

You can also schedule the concurrent program AMS: Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.3 Viewing Campaign Metric Charts

Use the following procedure to view metric charts for a campaign.

Prerequisite

As existing marketing campaign with an associated Metrics

Steps

1. Navigate to Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Execution from the side navigation.

4. Select Track > Metrics from the side navigation to view all the Metrics associated with the Campaign.
5. Select a Chart Option. The options include Pie and Bar Charts. By default the Pie Chart option is selected. You can change the Chart option by selecting either Pie or Bar and selecting the Go button. Only the summary metrics will have the chart icon. Summary Metrics are displayed with the option to expand the Metric Hierarchy. Select the plus sign (+) to expand the Metric Hierarchy to view the next level of detail.
6. Select the Chart icon to view the Chart. The chart displays the distribution of the sub-components that make up the summary metrics. For each of the components it displays the Actual and Forecast values.

2.2.19.4 Viewing Campaign Metrics History

You can view the trend of the Actual and Forecasted value for a Metrics by Viewing the Metrics History. The concurrent program AMS: Metrics Refresh Program records the Actual and Forecasted Values for a Metrics in the history tables for the corresponding marketing objects. The values in the metrics history tables are then used to display the Metrics History. See the *Oracle Marketing Implementation Guide* for more information.

Use the following procedure to view metrics history.

Prerequisite

As existing marketing campaign with an associated Metrics

Steps

1. Navigate to Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Select Track > Metrics from the side navigation to view all the Metrics associated with the Campaign.
5. Within the Metrics History section of the Metrics Details page, select a Metric by selecting the Search icon. A list of available Metrics is displayed. Select the corresponding Metric to view its History.
6. Enter the From (or Start) Date and To (or End) Date for the Metrics History.

7. You can specify the Data Interval by selecting the interval (Day, Week, Month, Year). For example, a Data Interval of 5 and Week, implies that the display co-ordinate for the x-axis is separated at 5-week intervals.
8. You can also specify the Value Type (Cumulative or Incremental). The x-axis is the time axis with display points based on the Refresh frequency for the Metrics. This is based on the configuration of the concurrent program AMS: Metrics Refresh Program. If you choose Cumulative, then the values are added up for each display co-ordinate within the x-axis. If you choose Incremental, then the value of the metric at a given interval is displayed directly.
9. Select View History to view the trend history for the Metrics.

2.2.19.5 Entering Values for Campaign Metrics

Use the following procedure to enter values for campaign metrics.

Prerequisites

An existing marketing campaign with an associated Metric

Steps

1. Navigate to Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Select Track > Metrics from the side navigation to view all the Metrics associated with the Campaign.
5. Select Input Only from the View Options. Select Go.
6. Summary and Rollup Metrics are displayed with the option to expand the Metrics Hierarchy. Select the plus sign (+) to expand the Metrics Hierarchy to view the next level of detail.
7. Enter values for Forecast and Actual where applicable. Forecast is not updatable if the Campaign is Active and the Actual is not updatable for Function metrics.
8. Select Refresh to see the newly created Metric values (for Actual or Forecast) calculated in the Summary or Rollup Metrics for this Campaign.

You can also schedule the concurrent program AMS: Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.6 Detaching a Campaign Metric

Use the following procedure to detach a metric from a campaign.

Prerequisites

An existing marketing campaign with an associated Metric

Steps

1. Navigate to Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Select Track > Metrics from the side navigation to view all the Metrics associated with the Campaign.
5. View the Metrics to be detached (or removed) from the marketing object. Summary and Rollup Metrics are displayed with the option to expand the Metrics Hierarchy. Select the plus sign (+) to expand the Metrics Hierarchy to view the next level of detail.
6. Select the check box in the Remove column corresponding to the Metrics that needs to be removed.
7. Select Update to save your changes.

2.2.19.7 Associating Campaign Costs and Revenues

Costs and Revenues are tracked using Metrics. Costs and Revenues are special type of metrics with features specific to accounting for costs and revenues. The Costs and Revenues side navigation menu displays the Costs and Revenues metrics associated with a Campaign. It allows you to track the forecasted and actual values for each Cost or Revenue Metric.

Prerequisites

The required Cost or Revenue metric should be set up by your System Administrator.

Steps

1. Navigate to Campaign Overview page.
2. Click on the link for the corresponding campaign.

3. Select Costs and Revenues from the side navigation to view all the Costs and Revenue metrics associated with the Campaign.
4. Within the Create New section of the Costs and Revenues Details page, click the Search icon to display a list of available Costs and Revenues metrics. Select a Cost or Revenue Metric from the list.
5. Select the currency. Enter the Forecast and Actual values in their respective columns. Optionally, select a Transaction Date and enter a Description. The Transaction Date is a reference for you. It is not used within the metrics logic.
6. Select Create. The selected Cost or Revenue metrics is now associated with the Campaign and will show up in the Costs or Revenues section.
7. Select Refresh to see the newly provided Cost or Revenue value (for Actual or Forecast) calculated in the Summary or Rollup Metrics for this Campaign

You can also schedule the concurrent program AMS: Metrics Refresh Program to refresh the costs and revenues values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.8 Viewing Associated Campaign Costs and Revenues

Use the following procedure to view costs and revenue metrics associated with a campaign.

Prerequisite

As existing marketing campaign with an associated Cost or Revenue metric.

Steps

1. Navigate to Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Costs and Revenues from the side navigation link to view all the Costs and Revenues metrics associated with the Campaign.
4. Select a View Option. Values include (Details, Input Only, Function Only and Rollup Only). By default Details is selected.

Table 2–34 Campaign Cost and Revenue Metrics View Options

View Option	Description
Details	View all Cost and Revenue metrics associated with the Campaign. Summary Metrics are represented hierarchically with Rollup, Manual, and/or Function Metrics that define a summarization as leaf nodes of the Summary Hierarchy.
Input Only	View only the manually entered Cost and Revenue metrics. This option allows you to enter forecast and actual metric values. You cannot modify the forecasted values when the campaign is active.
Function Only	View only Cost and Revenue metrics based on PL/SQL procedures and functions. You can only input forecast values with this option.
Rollup Only	View only Cost and Revenue metrics that are rolled-up from lower levels in the marketing object hierarchy. You cannot input any data in this option.

5. Summary Cost and Revenue metrics are displayed with the option to expand the Summary Hierarchy. Select the plus sign (+) to view the next level of detail in the hierarchy. New row(s) appear detailing the individual cost or revenue metrics that compose the hierarchy.
6. Based on the Costs or Revenues metrics type, you can enter the Actual and/or Forecast Values for the metrics. For a Manual Cost or Revenue metrics you can enter the Actual Values and the Forecast Values. You cannot update the Forecast value when the Campaign is Active. For a Function Cost or Revenue metric you can only enter the Forecast Values.
7. Select Update to save your changes.
8. Select Refresh to see the newly created Cost or Revenue metric values (for Actual or Forecast) calculated in the corresponding Summary or Rollup metrics for this Campaign.

You can also schedule the concurrent program AMS: Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.9 Viewing Campaign Costs or Revenue Charts

Use the following procedure to view cost or revenue charts for campaigns.

Prerequisite

As existing marketing campaign with an associated Cost or Revenue metrics.

Steps

1. Navigate to Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Costs and Revenues from the side navigation link to view all the Costs and Revenues metrics associated with the Campaign.
4. Select a Chart Option. The options include Pie and Bar Charts. By default the Pie Chart option is selected. You can change the Chart option by selecting either Pie or Bar and selecting the Go button.
5. Only the summary Costs or Revenues metrics will have the chart icon. Note: Summary Costs and Revenues are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
6. Select the Chart icon to view the Chart. The chart displays the distribution of the sub-components that make up the summary Costs or Revenues. For each of the sub-components it displays the Forecasted and Actual Values.

2.2.19.10 Viewing Campaign Costs and Revenues History

You can view the trend of the Actual and Forecasted values for a Cost or Revenue metrics by viewing the History.

The concurrent program AMS: Metrics Refresh Program refreshes the costs and revenues metric values for all marketing objects. See the *Oracle Marketing Implementation Guide* for more information on concurrent programs. Every time this program is run, it records the Actual and Forecasted Values for the associated Cost or Revenue metrics in the history tables. The values in the history tables are then used to display the Costs or Revenues History

Prerequisite

As existing marketing campaign with an associated Costs or Revenues metrics

Steps

1. Navigate to Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Costs and Revenues from the side navigation link to view all the Costs and Revenues metrics associated with the Campaign.
4. Within the History section of the Costs and Revenues Details page, select a Cost or Revenue metrics by selecting the Search Icon. A list of available Costs or Revenues metrics is displayed. Select the corresponding Cost or Revenue metric to view its History.
5. Enter the From (or Start) Date and To (or End) Date for the Metrics History.
6. You can specify the Data Interval by selecting the interval (Day, Week, Month, Year). For example a Data Interval of 5 and Week, implies that the display co-ordinate for the x-axis is separated at 5 week intervals.
7. You can also specify the Value Type (Cumulative or Incremental).
8. Select View History to view the trend history for the Cost or Revenue metrics.

The intervals on the x-axis are based on the interval specified in Step 6. The y-coordinate is determined by the Cost or Revenue metric value from the metric refresh concurrent program that was run at the corresponding x-coordinate value. If you choose Cumulative, then the values are added up for each display co-ordinate on the x-axis. If you choose Incremental, then the value of the Cost or Revenue metric for the corresponding x-axis coordinate is displayed directly.

2.2.19.11 Entering Values for Campaign Costs and Revenue Metrics

Use the following procedure to enter values for campaign costs and revenues.

Prerequisite

As existing marketing campaign with associated Costs or Revenues Metrics

Steps

1. Navigate to Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Costs and Revenues from the side navigation link to view all the Costs and Revenues metrics associated with the Campaign.
4. Select Input Only from the View Options. Select Go.

5. Summary and Rollup Costs and Revenues metrics are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
6. Enter values for Forecast and Actual where applicable.
7. Check the Post to Budgets checkbox to post the Actual Costs to Budget. This will lock (non-editable) the Actual Cost column.
8. Select Update to save your changes.
9. Select Refresh to see the updated Cost or Revenue value (for Actual or Forecast) calculated in the Summary Cost or Revenue metrics for this Campaign.

You can also schedule the concurrent program AMS: Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.12 Detaching Campaign Costs or Revenue Metrics

Use the following procedure to detach a cost or revenue metric from a campaign.

Prerequisite

As existing marketing campaign with an associated Cost or Revenue metrics

Steps

1. Navigate to Campaign Overview page.
2. Click on the link for the corresponding campaign.
3. Select Costs and Revenues from the side navigation link to view all the Costs and Revenues metrics associated with the Campaign.
4. View the Costs or Revenues metrics to be removed from this campaign. Summary and Rollup Costs and Revenues metrics are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
5. Select the check box in the Remove column corresponding to the Costs or Revenues metrics that needs to be removed.
6. Select Update to save your changes.

Campaign Schedules

2.2.19.13 Associating Campaign Schedule Metrics

Use the following procedure to associate metrics with a campaign schedule.

Prerequisite

The required Metrics should be set up by your System Administrator.

Steps

1. Navigate to Campaign Overview page.
2. Click the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Click on the corresponding Campaign Schedule link.
5. Select Track > Metrics from the side navigation to view all the Metrics associated with the Campaign Schedule.
6. Within the Create New section of the Metrics Details page, click the Search icon to display a list of available Metrics. Select a Metric from the list.
7. Enter the Forecast and Actual values in their respective columns. Optionally, select a Transaction Date and enter a Description. The Transaction Date is a reference for you. It is not used within the metrics logic.
8. Select Create. The selected Metrics is now associated with the Campaign Schedule and will show up in the Metrics section.
9. Select Refresh to see the newly provided Metric values (for Actual or Forecast, step 7) calculated in the Summary or Rollup Metrics for this Campaign Schedule.

You can also schedule the concurrent program AMS: Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.14 Viewing Associated Campaign Schedule Metrics

Use this procedure to view metrics associated with a campaign schedule.

Prerequisite

As existing marketing campaign schedule with an associated Metrics

Steps

1. Navigate to Campaign Overview page.
2. Click the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Click on the corresponding Campaign Schedule link.
5. Select Track > Metrics from the side navigation to view all the Metrics associated with the Campaign Schedule.
6. Select a View Option. Values include (Details, Input Only, Function Only and Rollup Only). By default Details is selected.

Table 2–35 Campaign Schedule Metrics View Options

View Option	Description
Details	View all Metrics associated with the Campaign Schedule. Summary Metrics are represented hierarchically and have Rollup, Manual and/or Function Metrics that define a summarization as leaf nodes of the Summary Hierarchy.
Input Only	View only the Manually entered Metrics. This option allows you to enter forecast and actual metric values.
Function Only	View only Metrics based on PL/SQL procedures and functions. You can only input forecast values with this option.
Rollup Only	View only Metrics that are rolled-up from lower levels in the marketing object hierarchy. You cannot input any data in this option.

7. Summary metrics are displayed with the option to expand the Summary Hierarchy. Select the plus sign (+) to view the next level of detail in the hierarchy. New row(s) appear detailing the individual metrics that compose the hierarchy.
8. Based on the Metrics type, you can enter the Actual and/or Forecast Values for the Metrics. For a Manual Metrics you can enter the Actual Values and the Forecast Values. For a Function Metrics you can only enter the Forecast Values.
9. Select Update to save your changes.
10. Select Refresh to see the newly created Metric values (for Actual or Forecast) calculated in the Summary or Rollup Metrics for this Campaign Schedule.

You can also schedule the concurrent program AMS: Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.15 Viewing Campaign Schedule Metrics Charts

Use this procedure to view metric charts associated with a campaign schedule.

Prerequisite

As existing marketing campaign schedule with an associated Metrics

Steps

1. Navigate to Campaign Overview page.
2. Click the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Click on the corresponding Campaign Schedule link.
5. Select Track > Metrics from the side navigation menu to view all the Metrics associated with the Campaign Schedule.
6. Select a Chart Option. The options include Pie and Bar Charts. By default the Pie Chart option is selected. You can change the Chart option by selecting either Pie or Bar and selecting the Go button.
7. Only the summary metrics will have the chart icon. Summary Metrics are displayed with the option to expand the Metric Hierarchy. Select the plus sign (+) to expand the Metric Hierarchy to view the next level of detail.
8. Select the Chart icon to view the Chart. The chart displays the distribution of the sub-components that make up the summary metrics. For each of the sub-components it displays the Forecasted and Actual Values.

2.2.19.16 Viewing Campaign Schedule Metrics History

You can view the trend of the Actual and Forecasted values for a Metrics by Viewing the Metrics History. The concurrent program AMS: Metrics Refresh Program refreshes the metric values for all marketing objects. See the *Oracle Marketing Implementation Guide* for more information on concurrent programs. Every time this program is run, it records the Actual and Forecasted Values for associated Metrics in the history tables. The values in the metrics history tables are then used to display the Metrics History.

Prerequisite

As existing marketing campaign schedule with an associated Metrics

Steps

1. Navigate to Campaign Overview page.
2. Click the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Click on the corresponding Campaign Schedule link.
5. Select Track > Metrics from the side navigation menu to view all the Metrics associated with the Campaign Schedule.
6. Within the Metrics History section of the Metrics Details page, select a Metric Name by selecting the Search Icon. A list of available Metrics is displayed. Select the corresponding Metric to view its History.
7. Enter the From (or Start) Date and To (or End) Date for the Metrics History.
8. You can specify the Data Interval by selecting the interval (Day, Week, Month, Year). For example a Data Interval of 5 and Week, implies that the display co-ordinate for the x-axis is separated at 5 week intervals.
9. You can also specify the Value Type (Cumulative or Incremental).
10. Select View History to view the trend history for the Metrics. The intervals on the x-axis are based on the interval specified in Step 6.

The y-coordinate is determined by the metric value from the metric refresh concurrent program that was run at the corresponding x-coordinate value. If you choose Cumulative, then the values are added up for each display co-ordinate on the x-axis. If you choose Incremental, then the value of the metric for the corresponding x-axis coordinate is displayed directly.

2.2.19.17 Entering Values for Campaign Schedule Metrics

Use the following procedure to enter values for campaign schedule metrics.

Prerequisite

As existing marketing campaign schedule with an associated Metrics

Steps

1. Navigate to Campaign Overview page.

2. Click the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Click on the corresponding Campaign Schedule link.
5. Select Track > Metrics from the side navigation menu to view all the Metrics associated with the Campaign Schedule.
6. Select Input Only from the View Options. Select Go.
7. Summary and Rollup Metrics are displayed with the option to expand the Metrics Hierarchy. Select the plus sign (+) to expand the Metrics Hierarchy to view the next level of detail.
8. Enter values for Forecast and Actual where applicable. The Actual value cannot be updated for Function metrics.
9. Select Update to save your changes.
10. Select Refresh to see the updated metric values (for Actual or Forecast) calculated in the Summary Metrics for this Campaign.

You can also schedule the concurrent program AMS: Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.18 Detaching a Campaign Schedule Metric

Use the following procedure to detach a metric from a campaign schedule.

Prerequisite

As existing marketing campaign schedule with an associated metrics

Steps

1. Navigate to Campaign Overview page.
2. Click the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Click on the corresponding Campaign Schedule link.
5. Select Track > Metrics from the side navigation menu to view all the Metrics associated with the Campaign Schedule.

6. View the Metrics to be removed from the marketing object. Summary and Rollup Metrics are displayed with the option to expand the metrics hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
7. Select the check box in the Remove column corresponding to the Metrics that needs to be removed.
8. Select Update to save your changes.

2.2.19.19 Associating Campaign Schedule Costs and Revenues

Use the following procedure to associate cost and revenue metrics with a campaign schedule.

Prerequisite

The required Cost or Revenue metric should be set up by your System Administrator.

Steps

1. Navigate to Campaign Overview page.
2. Click the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Click on the corresponding Campaign Schedule link.
5. Click the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Campaign Schedule.
6. Within the Create New section of the Costs and Revenues Details page, click the Search icon to display a list of available Costs and Revenues metrics. Select a Cost or Revenue Metric from the list.
7. Select the currency. Enter the Forecast and Actual values in their respective columns. Optionally, select a Transaction Date and enter a Description. The Transaction Date is a reference for you. It is not used within the metrics logic.
8. Select Create. The selected Cost or Revenue metrics is now associated with the Campaign Schedule and will show up in the Costs or Revenues section.
9. Select Refresh to see the newly provided Cost or Revenue value (for Actual or Forecast, step 7) calculated in the Summary or Rollup Metrics for this Campaign Schedule.

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the costs and revenues values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.20 Viewing Associated Campaign Schedule Costs and Revenues

Use the following procedure to view cost and revenue metrics associated with a campaign schedule.

Prerequisite

An existing marketing campaign schedule with an associated Cost or Revenue metric

Steps

- 1. Navigate to Campaign Overview page.
- 2. Click the link for the corresponding campaign.
- 3. Select Execution from the side navigation.
- 4. Click on the corresponding Campaign Schedule link.
- 5. Select the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Campaign Schedule.
- 6. Select a View Option. Values include (Details, Input Only, Function Only and Rollup Only). By default Details is selected.

Table 2–36 Campaign Schedule Cost and Revenue Metrics View Options

View Option	Description
Details	View all Cost and Revenue metrics associated with the Campaign Schedule. Summary Metrics are represented hierarchically with Rollup, Manual, and/or Function Metrics that define a summarization as leaf nodes of the Summary Hierarchy.
Input Only	View only the manually entered Cost and Revenue metrics. This option allows you to enter forecast and actual metric values. You cannot modify the forecasted values when the Campaign Schedule is active.
Function Only	View only Cost and Revenue metrics based on PL/SQL procedures and functions. You can only input forecast values with this option.

Table 2–36 Campaign Schedule Cost and Revenue Metrics View Options

View Option	Description
Rollup Only	View only Cost and Revenue metrics that are rolled-up from lower levels in the marketing object hierarchy. You cannot input any data in this option.

7. Summary Cost and Revenue metrics are displayed with the option to expand the Summary Hierarchy. Select the plus sign (+) to view the next level of detail in the hierarchy. New row(s) appear detailing the individual cost or revenue metrics that compose the hierarchy.
8. Based on the Costs or Revenues metrics type, you can enter the Actual and/or Forecast Values for the metrics. For a Manual Cost or Revenue metrics you can enter the Actual Values and the Forecast Values. You cannot update the Forecast value when the Campaign is Active. For a Function Cost or Revenue metric you can only enter the Forecast Values.
9. Select Update to save your changes.
10. Select Refresh to see the newly created Cost or Revenue metric values (for Actual or Forecast) calculated in the corresponding Summary or Rollup metrics for this Campaign Schedule

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.21 Viewing Campaign Schedule Costs or Revenues Charts

Use the following procedure to campaign schedule cost and revenue metrics charts.

Prerequisite

As existing marketing campaign schedule with an associated Cost or Revenue metrics

Steps

1. Navigate to Campaign Overview page.
2. Click the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Click on the corresponding Campaign Schedule link.

5. Select the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Campaign Schedule.
6. Select a Chart Option. The options include Pie and Bar Charts. By default the Pie Chart option is selected. You can change the Chart option by selecting either Pie or Bar and selecting the Go button.
7. Only the summary Costs or Revenues metrics will have the chart icon. Summary Costs and Revenues are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
8. Select the Chart icon to view the Chart. The chart displays the distribution of the sub-components that make up the summary Costs or Revenues. For each of the sub-components it displays the Forecasted and Actual Values.

2.2.19.22 Viewing Campaign Schedule Costs and Revenues History

You can view the trend of the Actual and Forecasted values for a Cost or Revenue metrics by viewing the History. The concurrent program AMS - Metrics Refresh Program refreshes the costs and revenues metric values for all marketing objects (see the *Oracle Marketing Implementation Guide* for more information on this program). Every time this program is run, it records the Actual and Forecasted Values for the associated Cost or Revenue metrics in the history tables. The values in the history tables are then used to display the Costs or Revenues History

Use the following procedure to view cost and revenue metrics history for a campaign schedule.

Prerequisite

As existing marketing campaign schedule with an associated Costs or Revenues metrics

Steps

1. Navigate to Campaign Overview page.
2. Click the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Click on the corresponding Campaign Schedule link.
5. Select the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Campaign Schedule.

6. Within the History section of the Costs and Revenues Details page, select a Cost or Revenue metrics by selecting the Search Icon. A list of available Costs or Revenues metrics is displayed. Select the corresponding Cost or Revenue metric to view its History.
7. Enter the From (or Start) Date and To (or End) Date for the Metrics History.
8. You can specify the Data Interval by selecting the interval (Day, Week, Month, Year). For example, a Data Interval of 5 and Week, implies that the display co-ordinate for the x-axis is separated at 5 week intervals.
9. You can also specify the Value Type (Cumulative or Incremental).
10. Select View History to view the trend history for the Cost or Revenue metrics. The intervals on the x-axis are based on the interval specified in Step 6. The y-coordinate is determined by the Cost or Revenue metric value from the metric refresh concurrent program that was run at the corresponding x-coordinate value.
 - If you choose Cumulative, then the values are added up for each display co-ordinate on the x-axis.
 - If you choose Incremental, then the value of the Cost or Revenue metric for the corresponding x-axis coordinate is displayed directly.

2.2.19.23 Entering Values for Campaign Schedule Costs and Revenues

Use the following procedure to enter values for a cost or revenue metric associated with a campaign schedule

Prerequisite

As existing marketing campaign schedule with associated Costs or Revenues Metrics

Steps

1. Navigate to Campaign Overview page.
2. Click the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Click on the corresponding Campaign Schedule link.
5. Select the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Campaign Schedule.

6. Select Input Only from the View Options. Select Go.
7. Summary and Rollup Costs and Revenues metrics are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
8. Enter values for Forecast and Actual where applicable.
9. Check the Post to Budgets checkbox to post the Actual Costs to Budget. This will lock (non-editable) the Actual Cost column.
10. Select Update to save your changes.
11. Select Refresh to see the updated Cost or Revenue value (for Actual or Forecast) calculated in the Summary Cost or Revenue metrics for this Campaign Schedule.

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.24 Detaching Campaign Schedule Costs or Revenues

Use the following procedure to detach a cost or revenue metric from a campaign schedule.

Prerequisite

An existing marketing campaign schedule with an associated Cost or Revenue metrics

Steps

1. Navigate to Campaign Overview page.
2. Click the link for the corresponding campaign.
3. Select Execution from the side navigation.
4. Click on the corresponding Campaign Schedule link.
5. Select the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Campaign Schedule.
6. View the Costs or Revenues metrics to be removed from this campaign schedule. Summary and Rollup Costs and Revenues metrics are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.

7. Select the check box in the Remove column corresponding to the Costs or Revenues metrics that needs to be removed.
8. Select Update to save your changes.

Programs

2.2.19.25 Viewing Associated Program Metrics

Program level metrics enables the marketer to track the summarized view of the corresponding categories (Responses, Leads, Opportunities, etc.). For example, analyzing the Total Response Metrics at the Program level enables the marketer to look at the total responses at the Program level and drill down into the responses at the sub-component levels, i.e., responses rolled up at the campaign level (Rolled Up Campaign Responses) and responses rolled up at an event level (Rolled Up Event Responses). Within these Metrics, the marketer can view the actual and forecasted counts. All the seeded metrics will be summarized at the Program level.

You cannot associate a new metrics at the Program level. Use the following procedure to view metrics associated with a program.

Prerequisite

As existing marketing program with an associated metrics

Steps

1. Navigate to Program Overview page.
2. Click on the link for the corresponding Program.
3. Click the Metrics side navigation link to view all the Metrics associated with the Program.
4. Select a View Option. Values include (Details, Input Only, Function Only and Rollup Only). By default Details is selected.

Table 2–37 Program Metrics View Options

View Option	Description
Details	View all Metrics associated with the Program. Summary Metrics are represented hierarchically and have Rollup, Manual and/or Function Metrics that define a summarization as leaf nodes of the Summary Hierarchy.
Input Only	View only the Manually entered Metrics.

Table 2–37 Program Metrics View Options

View Option	Description
Function Only	View only Metrics based on PL/SQL procedures and functions
Rollup Only	View only Metrics that are rolled-up from lower levels in the marketing object hierarchy. You cannot input any data in this option.

- 5. Summary metrics are displayed with the option to expand the Summary Hierarchy. Select the plus sign (+) to view the next level of detail in the hierarchy. New row(s) appear detailing the individual metrics that compose the hierarchy.
- 6. Based on the Metrics type, you can enter the Actual and/or Forecast Values for the Metrics. For a Manual Metrics you can enter the Actual Values and the Forecast Values. For a Function Metrics you can only enter the Forecast Values.
- 7. Select Update to save your changes.
- 8. Select Refresh to see the newly created Metric values (for Actual or Forecast) calculated in the Summary or Rollup Metrics for this Program.

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.26 Viewing Program Metrics Charts

Use the following procedure to view program metric charts.

Prerequisite

As existing marketing program with an associated Metrics

Steps

- 1. Navigate to Program Overview page.
- 2. Click on the link for the corresponding Program.
- 3. Click the Metrics side navigation link to view all the Metrics associated with the Program.

4. Select a Chart Option. The options include Pie and Bar Charts. By default the Pie Chart option is selected. You can change the Chart option by selecting either Pie or Bar and selecting the Go button.
5. Only the summary metrics will have the chart icon. Summary Metrics are displayed with the option to expand the Metric Hierarchy. Select the plus sign (+) to expand the Metric Hierarchy to view the next level of detail.
6. Select the Chart icon to view the Chart. The chart displays the distribution of the sub-components that make up the summary metrics. For each of the sub-components it displays the Forecasted and Actual Values.

2.2.19.27 Viewing Program Metrics History

You can view the trend of the Actual and Forecasted values for a Metrics by Viewing the Metrics History. The concurrent program AMS - Metrics Refresh Program refreshes the metric values for all marketing objects (see the *Oracle Marketing Implementation Guide* for more information on this program). Every time this program is run, it records the Actual and Forecasted Values for associated Metrics in the history tables. The values in the metrics history tables are then used to display the Metrics History.

Use the following procedure to view metrics history for a program.

Prerequisite

As existing marketing program with an associated Metrics

Steps

1. Navigate to Program Overview page.
2. Click on the link for the corresponding Program.
3. Click the Metrics side navigation link to view all the Metrics associated with the Program.
4. Within the Metrics History section of the Metrics Details page, select a Metric Name by selecting the Search Icon. A list of available Metrics are displayed. Select the corresponding Metric to view its History.
5. Enter the From (or Start) Date and To (or End) Date for the Metrics History.
6. You can specify the Data Interval by selecting the interval (Day, Week, Month, Year). For example a Data Interval of 5 and Week, implies that the display co-ordinate for the x-axis is separated at 5 week intervals.

7. You can also specify the Value Type (Cumulative or Incremental).
8. Select View History to view the trend history for the Metrics. The intervals on the x-axis are based on the interval specified in Step 6. The y-coordinate is determined by the metric value from the metric refresh concurrent program that was run at the corresponding x-coordinate value.
 - If you choose Cumulative, then the values are added up for each display co-ordinate on the x-axis.
 - If you choose Incremental, then the value of the metric for the corresponding x-axis coordinate is displayed directly.

2.2.19.28 Detaching Program Metrics

Use the following procedure to detach a metric from a program.

Prerequisite

As existing marketing program with an associated metrics

Steps

1. Navigate to Program Overview page.
2. Click on the link for the corresponding Program.
3. Click the Metrics side navigation link to view all the Metrics associated with the Program.
4. View the Metrics to be removed from the marketing object. Summary and Rollup Metrics are displayed with the option to expand the metrics hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
5. Select the check box in the Remove column corresponding to the Metrics that needs to be removed.
6. Select Update to save your changes.

2.2.19.29 Viewing Associated Program Costs and Revenues

Use the following procedure to view cost and revenue metrics associated with a program.

Prerequisite

As existing marketing campaign schedule with an associated Cost or Revenue metric

Steps

1. Navigate to Program Overview page.
2. Click on the link for the corresponding Program.
3. Click the Costs and Revenues side navigation link to view all the Costs and Revenues associated with the Program.
4. Select a View Option. Values include (Details, Input Only, Function Only and Rollup Only). By default Details is selected.

Table 2–38 Program Cost and Revenue Metrics View Options

View Option	Description
Details	View all Cost and Revenue metrics associated with the Program. Summary Metrics are represented hierarchically with Rollup, Manual, and/or Function Metrics that define a summarization as leaf nodes of the Summary Hierarchy.
Input Only	View only the manually entered Cost and Revenue metrics. This option allows you to enter forecast and actual metric values. You cannot modify the forecasted values when the Program is active.
Function Only	View only Cost and Revenue metrics based on PL/SQL procedures and functions. You can only input forecast values with this option.
Rollup Only	View only Cost and Revenue metrics that are rolled-up from lower levels in the marketing object hierarchy. You cannot input any data in this option.

5. Summary Cost and Revenue metrics are displayed with the option to expand the Summary Hierarchy. Select the plus sign (+) to view the next level of detail in the hierarchy. New row(s) appear detailing the individual cost or revenue metrics that compose the hierarchy.
6. Based on the Costs or Revenues metrics type, you can enter the Actual and/or Forecast Values for the metrics. For a Manual Cost or Revenue metrics you can enter the Actual Values and the Forecast Values. You cannot update the Forecast value when the Campaign is Active). For a Function Cost or Revenue metric you can only enter the Forecast Values.
7. Select Update to save your changes.

8. Select Refresh to see the newly created Cost or Revenue metric values (for Actual or Forecast) calculated in the corresponding Summary or Rollup metrics for this Program.

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.30 Viewing Program Costs or Revenues Charts

Use the following procedure to view cost or revenue charts for a program.

Prerequisite

As existing marketing program with an associated Cost or Revenue metrics

Steps

1. Navigate to Program Overview page.
2. Click on the link for the corresponding Program.
3. Click the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Program.
4. Select a Chart Option. The options include Pie and Bar Charts. By default the Pie Chart option is selected. You can change the Chart option by selecting either Pie or Bar and selecting the Go button.
5. Only the summary Costs or Revenues metrics will have the chart icon. Summary Costs and Revenues are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
6. Select the Chart icon to view the Chart. The chart displays the distribution of the sub-components that make up the summary Costs or Revenues. For each of the sub-components it displays the Forecasted and Actual Values.

2.2.19.31 Viewing Program Costs and Revenues History

You can view the trend of the Actual and Forecasted values for a Cost or Revenue metrics by viewing the History. The concurrent program AMS - Metrics Refresh Program refreshes the costs and revenues metric values for all marketing objects (see the *Oracle Marketing Implementation Guide* for more information on this program). Every time this program is run, it records the Actual and Forecasted

Values for the associated Cost or Revenue metrics in the history tables. The values in the history tables are then used to display the Costs or Revenues History.

Use the following procedure to view cost or revenue history for a Program.

Prerequisite

As existing marketing program with an associated Costs or Revenues metrics

Steps

1. Navigate to Program Overview page.
2. Click on the link for the corresponding Program.
3. Click the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Program.
4. Within the History section of the Costs and Revenues Details page, select a Cost or Revenue metrics by selecting the Search Icon. A list of available Costs or Revenues metrics is displayed. Select the corresponding Cost or Revenue metric to view its History.
5. Enter the From (or Start) Date and To (or End) Date for the Metrics History.
6. You can specify the Data Interval by selecting the interval (Day, Week, Month, Year). For example, a Data Interval of 5 and Week, implies that the display co-ordinate for the x-axis is separated at 5 week intervals.
7. You can also specify the Value Type (Cumulative or Incremental).
8. Select View History to view the trend history for the Cost or Revenue metrics. The intervals on the x-axis are based on the interval specified in Step 6. The y-coordinate is determined by the Cost or Revenue metric value from the metric refresh concurrent program that was run at the corresponding x-coordinate value.
 - If you choose Cumulative, then the values are added up for each display co-ordinate on the x-axis.
 - If you choose Incremental, then the value of the Cost or Revenue metric for the corresponding x-axis coordinate is displayed directly.

2.2.19.32 Detaching Program Costs or Revenue Metrics

Use the following procedure to detach a cost or revenue metric from a Program.

Prerequisite

As existing marketing program with associated Cost or Revenue metrics

Steps

1. Navigate to Program Overview page.
2. Click on the link for the corresponding Program.
3. Click the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Program.
4. View the Costs or Revenues metrics to be removed from this campaign schedule. Summary and Rollup Costs and Revenues metrics are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
5. Select the check box in the Remove column corresponding to the Costs or Revenues metrics that needs to be removed.
6. Select Update to save your changes.

Events

2.2.19.33 Associating Event Metrics

Use the following procedure to associate metrics with an Event.

Prerequisite

The required Metrics should be set up by your System Administrator.

Steps

1. Navigate to Event Overview page.
2. Click the link for the corresponding Event.
3. Select Track > Metrics from the side navigation to view all the Metrics associated with the Event.
4. Within the Create New section of the Metrics Details page, click the Search icon to display a list of available Metrics. Select a Metric from the list.

5. Enter the Forecast and Actual values in their respective columns. Optionally, select a Transaction Date and enter a Description. The Transaction Date is a reference for you. It is not used within the metrics logic.
6. Select Create. The selected Metrics is now associated with the Event and will show up in the Metrics section.
7. Select Refresh to see the newly provided Metric values (for Actual or Forecast, step 5) calculated in the Summary or Rollup Metrics for this Event

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.34 Viewing Associated Event Metrics

Use the following procedure to view metrics associated with an Event.

Prerequisite

As existing Event with associated Metrics

Steps

1. Navigate to Event Overview page.
2. Click the link for the corresponding Event.
3. Select Track > Metrics from the side navigation to view all the Metrics associated with the Event.
4. Select a View Option. Values include (Details, Input Only, Function Only and Rollup Only). By default Details is selected.

Table 2–39 Event Metrics View Options

View Option	Description
Details	View all Metrics associated with the Event. Summary Metrics are represented hierarchically and have Rollup, Manual and/or Function Metrics that define a summarization as leaf nodes of the Summary Hierarchy.
Input Only	View only the Manually entered Metrics. This option allows you to enter forecast and actual metric values.
Function Only	View only Metrics based on PL/SQL procedures and functions. You can only input forecast values with this option.

Table 2–39 Event Metrics View Options

View Option	Description
Rollup Only	View only Metrics that are rolled-up from lower levels in the marketing object hierarchy. You cannot input any data in this option.

- 5. Summary metrics are displayed with the option to expand the Summary Hierarchy. Select the plus sign (+) to view the next level of detail in the hierarchy. New row(s) appear detailing the individual metrics that compose the hierarchy.
- 6. Based on the Metrics type, you can enter the Actual and/or Forecast Values for the Metrics. For a Manual Metrics you can enter the Actual Values and the Forecast Values. For a Function Metrics you can only enter the Forecast Values.
- 7. Select Update to save your changes.
- 8. Select Refresh to see the newly created Metric values (for Actual or Forecast) calculated in the Summary or Rollup Metrics for this Event.

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.35 Viewing Event Metrics Charts

Use the following procedure to view Event metrics charts.

Prerequisite

As existing marketing event with an associated Metrics

Steps

- 1. Navigate to Event Overview page.
- 2. Click the link for the corresponding Event.
- 3. Select Track > Metrics from the side navigation to view all the Metrics associated with the Event.
- 4. Select a Chart Option. The options include Pie and Bar Charts. By default the Pie Chart option is selected. You can change the Chart option by selecting either Pie or Bar and selecting the Go button.

5. Only the summary metrics will have the chart icon. Note: Summary Metrics are displayed with the option to expand the Metric Hierarchy. Select the plus sign (+) to expand the Metric Hierarchy to view the next level of detail.
6. Select the Chart icon to view the Chart. The chart displays the distribution of the sub-components that make up the summary metrics. For each of the sub-components it displays the Forecasted and Actual Values.

2.2.19.36 Viewing Event Metrics History

You can view the trend of the Actual and Forecasted values for a Metrics by Viewing the Metrics History. The concurrent program AMS - Metrics Refresh Program refreshes the metric values for all marketing objects (see the *Oracle Marketing Implementation Guide* for more information on this program). Every time this program is run, it records the Actual and Forecasted Values for associated Metrics in the history tables. The values in the metrics history tables are then used to display the Metrics History

Use the following procedure to view Event metrics history.

Prerequisite

As existing marketing event with an associated Metrics

Steps

1. Navigate to Event Overview page.
2. Click the link for the corresponding Event.
3. Select Track > Metrics from the side navigation to view all the Metrics associated with the Event.
4. Within the Metrics History section of the Metrics Details page, select a Metric Name by selecting the Search Icon. A list of available Metrics are displayed. Select the corresponding Metric to view its History.
5. Enter the From (or Start) Date and To (or End) Date for the Metrics History.
6. You can specify the Data Interval by selecting the interval (Day, Week, Month, Year). For example a Data Interval of 5 and Week, implies that the display co-ordinate for the x-axis is separated at 5 week intervals.
7. You can also specify the Value Type (Cumulative or Incremental).
8. Select View History to view the trend history for the Metrics. The intervals on the x-axis are based on the interval specified in Step 6. The y-coordinate is

determined by the metric value from the metric refresh concurrent program that was run at the corresponding x-coordinate value.

- If you choose Cumulative, then the values are added up for each display co-ordinate on the x-axis.
- If you choose Incremental, then the value of the metric for the corresponding x-axis coordinate is displayed directly.

2.2.19.37 Entering Values for Event Metrics

Use the following procedure to enter values for Event metrics.

Prerequisite

As existing marketing event with an associated Metrics

Steps

1. Navigate to Event Overview page.
2. Click the link for the corresponding Event.
3. Select Track > Metrics from the side navigation to view all the Metrics associated with the Event.
4. Select Input Only from the View Options. Select Go.
5. Summary and Rollup Metrics are displayed with the option to expand the Metrics Hierarchy. Select the plus sign (+) to expand the Metrics Hierarchy to view the next level of detail.
6. Enter values for Forecast and Actual where applicable. The Actual value is not updatable for Function metrics.
7. Select Update to save your changes.
8. Select Refresh to see the updated metric values (for Actual or Forecast) calculated in the Summary Metrics for this Event.

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.38 Detaching Event Metrics

Use the following procedure to detach a metric from an Event.

Prerequisite

As existing marketing event with an associated metrics

Steps

1. Navigate to Event Overview page.
2. Click the link for the corresponding Event.
3. Select Track > Metrics from the side navigation to view all the Metrics associated with the Event.
4. View the Metrics to be removed from the marketing object. Summary and Rollup Metrics are displayed with the option to expand the metrics hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
5. Select the check box in the Remove column corresponding to the Metrics that needs to be removed.
6. Select Update to save your changes.

2.2.19.39 Associating Event Costs and Revenues

Use the following procedure to associate cost or revenue metrics with an Event.

Prerequisite

The required Cost or Revenue metric should be set up by your System Administrator.

Steps

1. Navigate to the Event Overview page.
2. Click the link for the corresponding event.
3. Click the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Event.
4. Within the Create New section of the Costs and Revenues Details page, click the Search icon to display a list of available Costs and Revenues metrics. Select a Cost or Revenue Metric from the list.

- 5. Select the currency. Enter the Forecast and Actual values in their respective columns. Optionally, select a Transaction Date and enter a Description. The Transaction Date is a reference for you. It is not used within the metrics logic.
 - 6. Select Create. The selected Cost or Revenue metrics is now associated with the Event and will show up in the Costs or Revenues section.
 - 7. Select Refresh to see the newly provided Cost or Revenue value (for Actual or Forecast, step 5) calculated in the Summary or Rollup Metrics for this Event
- You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the costs and revenues values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.40 Viewing Associated Event Costs and Revenues

Use the following procedure to view cost or revenue metrics associated with an Event.

Prerequisite

As existing marketing event with an associated Cost or Revenue metric

Steps

- 1. Navigate to the Event Overview page.
- 2. Click the link for the corresponding event.
- 3. Click the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Event.
- 4. Select a View Option. Values include (Details, Input Only, Function Only and Rollup Only). By default Details is selected.

Table 2–40 Event Cost and Revenue Metrics View Options

View Option	Description
Details	View all Cost and Revenue metrics associated with the Event. Summary Metrics are represented hierarchically with Rollup, Manual, and /or Function Metrics that define a summarization as leaf nodes of the Summary Hierarchy.
Input Only	View only the manually entered Cost and Revenue metrics. This option allows you to enter forecast and actual metric values. You cannot modify the forecasted values when the Event is active.

Table 2–40 Event Cost and Revenue Metrics View Options

View Option	Description
Function Only	View only Cost and Revenue metrics based on PL/SQL procedures and functions. You can only input forecast values with this option.
Rollup Only	View only Cost and Revenue metrics that are rolled-up from lower levels in the marketing object hierarchy. You cannot input any data in this option.

5. Summary Cost and Revenue metrics are displayed with the option to expand the Summary Hierarchy. Select the plus sign (+) to view the next level of detail in the hierarchy. New row(s) appear detailing the individual cost or revenue metrics that compose the hierarchy.
6. Based on the Costs or Revenues metrics type, you can enter the Actual and/or Forecast Values for the metrics. For a Manual Cost or Revenue metrics you can enter the Actual Values and the Forecast Values (Note: You cannot update the Forecast value when the Event is Active). For a Function Cost or Revenue metric you can only enter the Forecast Values.
7. Select Update to save your changes.
8. Select Refresh to see the newly created Cost or Revenue metric values (for Actual or Forecast) calculated in the corresponding Summary or Rollup metrics for this Event.

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.41 Viewing Event Costs or Revenues Charts

Use the following procedure to view cost or revenue charts for Events.

Prerequisite

As existing marketing event with an associated Cost or Revenue metrics

Steps

1. Navigate to the Event Overview page.
2. Click the link for the corresponding event.

3. Click the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Event.
4. Select a Chart Option. The options include Pie and Bar Charts. By default the Pie Chart option is selected. You can change the Chart option by selecting either Pie or Bar and selecting the Go button.
5. Only the summary Costs or Revenues metrics will have the chart icon. Note: Summary Costs and Revenues are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
6. Select the Chart icon to view the Chart. The chart displays the distribution of the sub-components that make up the summary Costs or Revenues. For each of the sub-components it displays the Forecasted and Actual Values.

2.2.19.42 Viewing Event Costs and Revenues History

You can view the trend of the Actual and Forecasted values for a Cost or Revenue metrics by viewing the History. The concurrent program AMS - Metrics Refresh Program refreshes the costs and revenues metric values for all marketing objects (see the *Oracle Marketing Implementation Guide* for more information on this program). Every time this program is run, it records the Actual and Forecasted Values for the associated Cost or Revenue metrics in the history tables. The values in the history tables are then used to display the Costs or Revenues History

Use the following procedure to view cost and revenue history for an Event.

Prerequisite

As existing marketing event with an associated Costs or Revenues metrics

Steps

1. Navigate to the Event Overview page.
2. Click the link for the corresponding Event.
3. Click the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Event.
4. Within the History section of the Costs and Revenues Details page, select a Cost or Revenue metrics by selecting the Search Icon. A list of available Costs or Revenues metrics is displayed. Select the corresponding Cost or Revenue metric to view its History.
5. Enter the From (or Start) Date and To (or End) Date for the Metrics History.

6. You can specify the Data Interval by selecting the interval (Day, Week, Month, Year). For example a Data Interval of 5 and Week, implies that the display co-ordinate for the x-axis is separated at 5 week intervals.
7. You can also specify the Value Type (Cumulative or Incremental).
8. Select View History to view the trend history for the Cost or Revenue metrics. The intervals on the x-axis are based on the interval specified in Step 6. The y-coordinate is determined by the Cost or Revenue metric value from the metric refresh concurrent program that was run at the corresponding x-coordinate value.
 - If you choose Cumulative, then the values are added up for each display co-ordinate on the x-axis.
 - If you choose Incremental, then the value of the Cost or Revenue metric for the corresponding x-axis coordinate is displayed directly.

2.2.19.43 Entering Values for Event Costs and Revenues

Use the following procedures to enter values for an Event cost or revenue metric.

Prerequisite

As existing marketing event with associated Costs or Revenues Metrics

Steps

1. Navigate to the Event Overview page.
2. Click the link for the corresponding Event.
3. Click the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Event.
4. Select Input Only from the View Options. Select Go.
5. Summary and Rollup Costs and Revenues metrics are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
6. Enter values for Forecast and Actual where applicable.
7. Check the Post to Budgets checkbox to post the Actual Costs to Budget. This will lock (non-editable) the Actual Cost column.
8. Select Update to save your changes.

9. Select Refresh to see the updated Cost or Revenue value (for Actual or Forecast) calculated in the Summary Cost or Revenue metrics for this Event

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.44 Detaching Event Costs or Revenues

Use the following procedure to detach cost or revenue metrics from an Event.

Prerequisite

As existing marketing event with an associated Cost or Revenue metrics

Steps

1. Navigate to the Event Overview page.
2. Click the link for the corresponding Event.
3. Click the Costs and Revenues side navigation link to view all the Costs and Revenue metrics associated with the Event.
4. View the Costs or Revenues metrics to be removed from this event. Summary and Rollup Costs and Revenues metrics are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
5. Select the check box in the Remove column corresponding to the Costs or Revenues metrics that needs to be removed.
6. Select Update to save your changes.

Event Schedules

2.2.19.45 Associating Event Schedule Metrics

Use the following procedure to associate a metric with an Event Schedule.

Prerequisite

The required Metrics should be set up by your System Administrator.

Steps

1. Navigate to Event > Event Schedules.

2. Click the link for the corresponding Event Schedule.
3. Click Track > Metrics from the side navigation to view all the Metrics associated with the Event Schedule.
4. Within the Create New section of the Metrics Details page, click the Search icon to display a list of available Metrics. Select a Metric from the list.
5. Enter the Forecast and Actual values in their respective columns. Optionally, select a Transaction Date and enter a Description. The Transaction Date is a reference for you. It is not used within the metrics logic.
6. Select Create. The selected Metrics is now associated with the Event Schedule and will show up in the Metrics section.
7. Select Refresh to see the newly provided Metric values calculated in the Summary or Rollup Metrics for this Event Schedule.

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.46 Viewing Associated Event Schedule Metrics

Use the following procedure to view metrics associated with an Event Schedule.

Prerequisite

An existing marketing event schedule with an associated Metrics

Steps

1. Navigate to Event > Event Schedules.
2. Click the link for the corresponding Event Schedule.
3. Click Track > Metrics from the side navigation to view all the Metrics associated with the Event Schedule.
4. Select a View Option. Values include (Details, Input Only, Function Only and Rollup Only). By default Details is selected.

Table 2–41 Event Schedule Metrics View Options

View Option	Description
Details	View all Metrics associated with the Event Schedule. Summary Metrics are represented hierarchically and have Rollup, Manual and/or Function Metrics that define a summarization as leaf nodes of the Summary Hierarchy.
Input Only	View only the Manually entered Metrics. This option allows you to enter forecast and actual metric values.
Function Only	View only Metrics based on PL/SQL procedures and functions. You can only input forecast values with this option.
Rollup Only	View only Metrics that are rolled-up from lower levels in the marketing object hierarchy. You cannot input any data in this option.

- 5. Summary metrics are displayed with the option to expand the Summary Hierarchy. Select the plus sign (+) to view the next level of detail in the hierarchy. New row(s) appear detailing the individual metrics that compose the hierarchy.
- 6. Based on the Metrics type, you can enter the Actual and/or Forecast Values for the Metrics. For a Manual Metrics you can enter the Actual Values and the Forecast Values. For a Function Metrics you can only enter the Forecast Values.
- 7. Select Update to save your changes.
- 8. Select Refresh to see the newly created Metric values (for Actual or Forecast) calculated in the Summary or Rollup Metrics for this Event Schedule

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.47 Viewing Event Schedule Metrics Charts

Use the following procedure to view metrics charts for Event Schedules.

Prerequisite

As existing marketing event schedule with an associated Metrics

Steps

- 1. Navigate to Event > Event Schedules.

2. Click the link for the corresponding Event Schedule.
3. Click Track > Metrics from the side navigation to view all the Metrics associated with the Event Schedule.
4. Select a Chart Option. The options include Pie and Bar Charts. By default the Pie Chart option is selected. You can change the Chart option by selecting either Pie or Bar and selecting the Go button.
5. Only the summary metrics will have the chart icon. Note: Summary Metrics are displayed with the option to expand the Metric Hierarchy. Select the plus sign (+) to expand the Metric Hierarchy to view the next level of detail.
6. Select the Chart icon to view the Chart. The chart displays the distribution of the sub-components that make up the summary metrics. For each of the sub-components it displays the Forecasted and Actual Values.

2.2.19.48 Viewing Event Schedule Metrics History

You can view the trend of the Actual and Forecasted values for a Metrics by Viewing the Metrics History. The concurrent program AMS - Metrics Refresh Program refreshes the metric values for all marketing objects (see the *Oracle Marketing Implementation Guide* for more information on this program). Every time this program is run, it records the Actual and Forecasted Values for associated Metrics in the history tables. The values in the metrics history tables are then used to display the Metrics History.

Prerequisite

As existing marketing event schedule with an associated Metrics

Steps

1. Navigate to Event > Event Schedules.
2. Click the link for the corresponding Event Schedule.
3. Click Track > Metrics from the side navigation to view all the Metrics associated with the Event Schedule.
4. Within the Metrics History section of the Metrics Details page, select a Metric Name by selecting the Search icon. A list of available Metrics are displayed. Select the corresponding Metric to view its History.
5. Enter the From (or Start) Date and To (or End) Date for the Metrics History.

6. You can specify the Data Interval by selecting the interval (Day, Week, Month, Year). For example a Data Interval of 5 and Week, implies that the display co-ordinate for the x-axis is separated at 5 week intervals.
7. You can also specify the Value Type (Cumulative or Incremental).
8. Select View History to view the trend history for the Metrics. The intervals on the x-axis are based on the interval specified in Step 6. The y-coordinate is determined by the metric value from the metric refresh concurrent program that was run at the corresponding x-coordinate value.
 - If you choose Cumulative, then the values are added up for each display co-ordinate on the x-axis.
 - If you choose Incremental, then the value of the metric for the corresponding x-axis coordinate is displayed directly.

2.2.19.49 Entering Values for Event Schedule Metrics

Use the following procedure to enter value for Event Schedule metrics.

Prerequisite

As existing marketing event schedule with an associated Metrics

Steps

1. Navigate to Event > Event Schedules.
2. Click the link for the corresponding Event Schedule.
3. Click Track > Metrics from the side navigation to view all the Metrics associated with the Event Schedule.
4. Select Input Only from the View Options. Select Go.
5. Summary and Rollup Metrics are displayed with the option to expand the Metrics Hierarchy. Select the plus sign (+) to expand the Metrics Hierarchy to view the next level of detail.
6. Enter values for Forecast and Actual where applicable. The Actual value is not updatable for Function metrics.
7. Select Update to save your changes.
8. Select Refresh to see the updated metric values (for Actual or Forecast) calculated in the Summary Metrics for this Event

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.50 Detaching Event Schedule Metrics

Use the following procedure to detach metrics from Event Schedules.

Prerequisite

As existing marketing event schedule with an associated metrics

Steps

1. Navigate to Event > Event Schedules.
2. Click the link for the corresponding Event Schedule.
3. Click Track > Metrics from the side navigation to view all the Metrics associated with the Event Schedule.
4. View the Metrics to be removed from the marketing object. Summary and Rollup Metrics are displayed with the option to expand the metrics hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
5. Select the check box in the Remove column corresponding to the Metrics that needs to be removed.
6. Select Update to save your changes.

2.2.19.51 Associating Event Schedule Costs and Revenues

Use the following procedure to associate costs or revenue metrics with Event Schedules.

Prerequisite

The required Cost or Revenue metric should be set up by your System Administrator.

Steps

1. Navigate to Event > Event Schedules.
2. Click the link for the corresponding Event Schedule.
3. Click the Costs and Revenues side navigation link to view the Costs or Revenues metrics associated with the Event Schedule.

- 4. Within the Create New section of the Costs and Revenues Details page, click the Search icon to display a list of available Costs and Revenues metrics. Select a Cost or Revenue Metric from the list.
- 5. Select the currency. Enter the Forecast and Actual values in their respective columns. Optionally, select a Transaction Date and enter a Description. The Transaction Date is a reference for you. It is not used within the metrics logic.
- 6. Click Create. The selected Cost or Revenue metrics is now associated with the Event Schedule and will show up in the Costs or Revenues section.
- 7. Select Refresh to see the newly provided Cost or Revenue value calculated in the Summary or Rollup Metrics for this Event Schedule

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the costs and revenues values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.52 Viewing Associated Event Schedule Costs and Revenues

Use the following procedure to view costs and revenue metrics associated with Event Schedules.

Prerequisite

As existing marketing event schedule with an associated Cost or Revenue metric

Steps

- 1. Navigate to Event > Event Schedules.
- 2. Click the link for the corresponding Event Schedule.
- 3. Click the Costs and Revenues side navigation link to view the Costs or Revenues metrics associated with the Event Schedule.
- 4. Select a View Option. Values include (Details, Input Only, Function Only and Rollup Only). By default Details is selected.

Table 2–42 Event Schedule Costs and Revenues Metrics View Options

View Option	Description
Details	View all Cost and Revenue metrics associated with the Event Schedule. Summary Metrics are represented hierarchically with Rollup, Manual, and/or Function Metrics that define a summarization as leaf nodes of the Summary Hierarchy.

Table 2–42 Event Schedule Costs and Revenues Metrics View Options

View Option	Description
Input Only	View only the manually entered Cost and Revenue metrics. This option allows you to enter forecast and actual metric values. You cannot modify the forecasted values when the Event Schedule is active.
Function Only	View only Cost and Revenue metrics based on PL/SQL procedures and functions. You can only input forecast values with this option.
Rollup Only	View only Cost and Revenue metrics that are rolled-up from lower levels in the marketing object hierarchy. You cannot input any data in this option.

5. Summary Cost and Revenue metrics are displayed with the option to expand the Summary Hierarchy. Select the plus sign (+) to view the next level of detail in the hierarchy. New row(s) appear detailing the individual cost or revenue metrics that compose the hierarchy.
6. Based on the Costs or Revenues metrics type, you can enter the Actual and/or Forecast Values for the metrics. For a Manual Cost or Revenue metrics you can enter the Actual Values and the Forecast Values (Note: You cannot update the Forecast value when the Event is Active). For a Function Cost or Revenue metric you can only enter the Forecast Values.
7. Select Update to save your changes.
8. Select Refresh to see the newly created Cost or Revenue metric values (for Actual or Forecast) calculated in the corresponding Summary or Rollup metrics for this Event Schedule.

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.53 Viewing Event Schedule Costs or Revenues Charts

Use the following procedure to costs and revenues charts for Event Schedules.

Prerequisite

As existing marketing event schedule with an associated Cost or Revenue metrics

Steps

1. Navigate to Event > Event Schedules.
2. Click the link for the corresponding Event Schedule.
3. Click the Costs and Revenues side navigation link to view the Costs or Revenues metrics associated with the Event Schedule.
4. Select a Chart Option. The options include Pie and Bar Charts. By default the Pie Chart option is selected. You can change the Chart option by selecting either Pie or Bar and selecting the Go button.
5. Only the summary Costs or Revenues metrics will have the chart icon. Summary Costs and Revenues are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
6. Select the Chart icon to view the Chart. The chart displays the distribution of the sub-components that make up the summary Costs or Revenues. For each of the sub-components it displays the Forecasted and Actual Values.

2.2.19.54 Viewing Event Schedule Costs and Revenues History

You can view the trend of the Actual and Forecasted values for a Cost or Revenue metrics by viewing the History. The concurrent program AMS - Metrics Refresh Program refreshes the costs and revenues metric values for all marketing objects (see the *Oracle Marketing Implementation Guide* for more information on this program). Every time this program is run, it records the Actual and Forecasted Values for the associated Cost or Revenue metrics in the history tables. The values in the history tables are then used to display the Costs or Revenues History

Use the following procedure to view costs and revenues history for Event Schedules.

Prerequisite

As existing marketing event schedule with an associated Costs or Revenues metrics

Steps

1. Navigate to Event > Event Schedules.
2. Click the link for the corresponding Event Schedule.
3. Click the Costs and Revenues side navigation link to view the Costs or Revenues metrics associated with the Event Schedule.

4. Within the History section of the Costs and Revenues Details page, select a Cost or Revenue metrics by selecting the Search icon. A list of available Costs or Revenues metrics is displayed. Select the corresponding Cost or Revenue metric to view its History.
5. Enter the From (or Start) Date and To (or End) Date for the Metrics History.
6. You can specify the Data Interval by selecting the interval (Day, Week, Month, Year). For example a Data Interval of 5 and Week, implies that the display co-ordinate for the x-axis is separated at 5 week intervals.
7. You can also specify the Value Type (Cumulative or Incremental).
8. Select View History to view the trend history for the Cost or Revenue metrics. The intervals on the x-axis are based on the interval specified in Step 6. The y-coordinate is determined by the Cost or Revenue metric value from the metric refresh concurrent program that was run at the corresponding x-coordinate value.
 - If you choose Cumulative, then the values are added up for each display co-ordinate on the x-axis.
 - If you choose Incremental, then the value of the Cost or Revenue metric for the corresponding x-axis coordinate is displayed directly.

2.2.19.55 Entering Values for Event Schedule Costs and Revenues

Use the following procedure to enter values for Event Schedule costs and revenues.

Prerequisite

As existing marketing event schedule with associated Costs or Revenues Metrics

Steps

1. Navigate to Event > Event Schedules.
2. Click the link for the corresponding Event Schedule.
3. Click the Costs and Revenues side navigation link to view the Costs or Revenues metrics associated with the Event Schedule.
4. Select Input Only from the View Options. Select Go.
5. Summary and Rollup Costs and Revenues metrics are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.

6. Enter values for Forecast and Actual where applicable.
7. Check the Post to Budgets checkbox to post the Actual Costs to Budget. This will lock (non-editable) the Actual Cost column.
8. Select Update to save your changes.
9. Select Refresh to see the updated Cost or Revenue value (for Actual or Forecast) calculated in the Summary Cost or Revenue metrics for this Event Schedule

You can also schedule the concurrent program AMS - Metrics Refresh Program to refresh the metrics values for all the marketing objects. See the *Oracle Marketing Implementation Guide* for more information.

2.2.19.56 Detaching Event Schedule Costs or Revenues

Use the following procedure to detach costs or revenue metrics from Event Schedules.

Prerequisite

As existing marketing event schedule with an associated Cost or Revenue metrics

Steps

1. Navigate to Event > Event Schedules.
2. Click the link for the corresponding Event Schedule.
3. Click the Costs and Revenues side navigation link to view the Costs or Revenues metrics associated with the Event Schedule.
4. View the Costs or Revenues metrics to be removed from this event schedule. Summary and Rollup Costs and Revenues metrics are displayed with the option to expand the hierarchy. Select the plus sign (+) to expand the hierarchy to view the next level of detail.
5. Select the check box in the Remove column corresponding to the Costs or Revenues metrics that needs to be removed.
6. Select Update to save your changes.

2.2.20 Personalizing Home Page Bins, Reports, and Charts

Use the following procedures to personalize your Home page:

- [Section 2.2.20.1, "Specifying Home Page Bins, Reports, and Charts"](#)
- [Section 2.2.20.2, "Editing a Home Page Bin"](#)
- [Section 2.2.20.3, "Editing a Home Page Report"](#)

Note: Each bin, report, and chart has configurable parameters. These parameters are either general or specific to the bin, report, or chart. For example, specific parameters may relate only to budgets. These parameters will be available only from the Budget bins, reports, and charts.

2.2.20.1 Specifying Home Page Bins, Reports, and Charts

Use this procedure to personalize the available bins, reports, and charts that are displayed on your Home page.

Prerequisites

None

Steps

1. Click the Home tab.
2. Click the Personalize link. You may have to scroll to the right to view the link.
3. Select a 2 or 3 column layout.
4. In the Narrow Column (Left) section of the page, select the bins you want to display from the Available Bins shuttle. Use the CTRL key to select multiple bins.
5. Click the Move (>) icon to move the selected bins to the Displayed Bins shuttle.
6. Use the up and down arrows on the Displayed Bin shuttle to specify the display order.
7. Scroll down to the Wide Column shuttle and repeat the previous 2 steps for modules (charts and graphs).

8. If you selected 3-column layout, the scroll down to the Narrow Column (Right) section of the page and select bins for this column. Otherwise, proceed to the next step.
9. Click Update to complete all changes.

2.2.20.2 Editing a Home Page Bin

Use the following procedure to edit a home page bin.

Prerequisites

An existing home page bin

Steps

1. Log in to Oracle Marketing. By default, the Home page is displayed.
2. Click the Edit link in the bin header.
3. Click the Personalize side navigation link.
4. Enter a Favorite name
5. Select your desired bin parameters.
6. Enter your desired bin attributes.
7. Click Save to complete all changes.

2.2.20.3 Editing a Home Page Report

Reports displayed directly on the Home page are drilldown reports displayed from a reporting bin, but with a configurable aggregate. Because Home Page reports are not derived from a reporting bin, then the aggregate must be configured. Similar aggregates are available as they are in the bins.

Columns and rows to display on a report are configurable via the Edit link.

Drilldown reports do not allow for data aggregation selection. The aggregate is inherited from the calling bin.

2.2.20.4 Editing Home Page Charts

Charts always represent the top comparison of components. For example in the Campaigns by Leads chart, if the number of rows to display was set to 10, then the chart renders with the top 10 Campaigns by Leads.

Rows to display in a chart are configurable via the Edit link.

You can perform the following edits:

- Edit link in header of chart
- Specify the period
- Specify the number of data elements
- Select the chart type

Using eMerchandising

This chapter describes how to use eMerchandising. Sections include:

- [Section 3.1, "eMerchandising Concepts"](#)
- [Section 3.2, "eMerchandising User Procedures"](#)
- [Section 3.3, "Troubleshooting"](#)

3.1 eMerchandising Concepts

The eMerchandising module of Oracle Marketing allows marketers to display personalized campaigns and offers, and product recommendations. It also enables you to leverage the Web as a marketing channel by pushing Web content to visitors and customers.

As a merchant, you can use eMerchandising to:

- Target the right customers at the right time via customer segmentation and postings rules
- Maximize shopping cart value by making product recommendations; make product recommendations based on browsing behavior, purchase behavior, and shopping cart contents
- Display personalized content selected through merchandising strategies
- Give Web offers to specific customers or a group of customers that belong to a segment or for every one. For example, 20% off on Product A for all the customers.

3.1.1 Business Benefits of eMerchandising

Companies can improve customer profitability by displaying personalized marketing messages to their customers and prospects. The messages can be customized to enhance the service, product, and brand awareness. By this, customers experience more relevant and personal care and this helps in reducing customer attrition. It also provides the ability to push relevant product recommendations to increase the up-sell and cross-sell opportunities, and that can lead to higher purchase values.

By creating personalized rules, companies can improve the productivity as they can be created once and used in different locations. This reduces the effort to create and deliver consistent personal marketing messages to customers and prospects.

Companies can keep marketing aligned with the organization as they can give marketers a direct control on displaying marketing message only to a set of people at different customer touch points.

In a nutshell, eMerchandising is a process of placing the contents in a container. The content can be marketing campaigns, offers or products. The container can be Oracle iStore, Oracle Partners, or your own Web store. You can also decide to whom you want the content to be displayed.

The content to display is created in Oracle Marketing, whom to display is defined in eMerchandising as a Web Posting, and the container to which the content is targeted is defined as a Web Placement.

3.1.2 eMerchandising Content

In eMerchandising, the content type specifies the type of Web posting. The three categories of content types are:

- [Section 3.1.2.1, "Product Recommendation"](#)
- [Section 3.1.2.2, "Web Advertisements"](#)
- [Section 3.1.2.3, "Web Offers"](#)

3.1.2.1 Product Recommendation

These are Inventory products published on iStore as Product Details. This content type makes product recommendations to the visitor by picking the products from the inventory. In iStore, images (media objects) are assigned to products and these images are displayed to customers.

At runtime, the recommended products are automatically filtered by the following criteria:

- Published flag: all the recommended products must be published in iStore
- Customer's specialty store: the visitor has the ability to buy all recommended products

3.1.2.2 Web Advertisements

Web ads refer to Oracle Marketing campaign schedule objects of type Internet Advertisement. You can use Web ads to improve product brand or company awareness or to alert a customer of new and upcoming products, deals, or other information.

Important: The selected campaign schedules are automatically filtered by the visitor's target group, if any. In Oracle Marketing, a schedule may be associated with a target group, consisting of a combination of lists, segments and workbooks. It is important for the marketer that only the customers pertaining to the schedule's target group be exposed to the campaign. Therefore, with this ability at runtime, eMerchandising selects only the campaigns for which the visitor is eligible.

A Web advertisement can have campaign schedule of content type Web Image or Web Text.

For details on stylesheet, see [Section 3.1.5, "Using Stylesheet to Display the Content"](#).

Web Image

A Web advertisement of content type Web image, can be an existing image on your server or a new image uploaded from your client. You can specify the width and height (in pixels) of the image, or accept the defaults based on the image file selected. The image can have alternate text, which will be displayed when the cursor is placed over the image. You can specify a specific language for the image or accept the default or All Languages. Click-through destination of the image, which, as the name indicates, is the destination to which the Web visitor is directed upon clicking on the image. The content types and subtypes determine the style, or look and feel, that is applied to the Web image.

See [Section 2.1.12, "Understanding Click-Through Destinations"](#) for more information.

Web Text

A Web advertisement of content type Web text contains a display text that is displayed in iStore or any Web site. You can select a specific language for the text or accept the default, or All Languages.

As with Web images, the subtypes are used in conjunction with Styles to display the text with the associated style.

3.1.2.3 Web Offers

Web Offers are marketing offers that are associated with a campaign schedule of type Internet Promotion. At runtime, eMerchandising renders the content ([Web Image](#), [Web Text](#)) associated with an offer.

3.1.3 Personalizing eMerchandising Content

A merchandiser can personalize the content in the following way:

- Select segments and list. This can be defined in the Audience tab of Oracle Marketing. Lists are a combination of segments, workbooks and other lists. At runtime, the eMerchandising engine checks if the visitor is part of at least one of the selected segments or lists. This allows you to define rules, such as, "If the visitor is part of the 18-25 year-old or 26-35 year-old segment, then recommend the following list of products."
- Compare the total amount of the active shopping cart to a value specified in the default currency (as defined in the Administration screen). This allows you to

define rules, such as, “If visitor’s shopping cart amount is greater than \$1,000 display the high-end product line advertisements.”

- Create your own custom conditions and register these classes in the eMerchandising Administration tab. These custom conditions are available to use in the conditions list.

3.1.4 Content Displayed by eMerchandising

With eMerchandising, marketers can display personalized campaigns, offers, and product recommendations to customers and prospects on iStore, Partner Portal, and other Web sites. Styles are used to control the rendering of content on your store. You can display the same content in different ways.

For Web Advertisements and Offers, you can use Web Content styles that govern images, text, and click-through destinations.

For Product Recommendations, you use iStore multi-media styles that govern images, product details, and shopping cart links. These are the styles available as out-of-the-box pages for iStore. Styles are content specific: You may not be able to use campaign style sheets to product style sheets. See [Out-of-box iStore Pages](#) for more details.

3.1.5 Using Stylesheet to Display the Content

A content type is picked or selected during the posting definition. Stylesheets render Web images on the Web site with a short description. These styles represent the stylesheets that are applied to the XML content returned by the eMerchandising engine at runtime. eMerchandising will provide an interface in the Administration section to manage the styles per content type. A stylesheet can be of type universal, half banner, full banner, and so on.

A stylesheet is used to display content of different type, Web Image or Web Text. You can create new styles by copying and modifying the style sheets provided out of the box.

For information on customizing stylesheets and samples, see the *Oracle Marketing Implementation Guide*.

3.1.6 Understanding Web Postings

A Web posting is an object used to define the personalized content that is dynamically selected and displayed in a placement, at runtime. There are two types of postings:

- [Section 3.1.6.1, "Universal Posting"](#)
- [Section 3.1.6.2, "Rule-Based Posting"](#)

3.1.6.1 Universal Posting

A universal posting applies the same merchandising strategy to all the visitors, however, the strategy may return different personalized content to different visitors.

3.1.6.2 Rule-Based Posting

A rule-based posting consists of a set of one or more rules. These rules have conditions or criteria which need to be met. Once the conditions are met, the strategy type determines what content to display. A rule-based posting can apply different merchandising strategies to different visitors. Visitors are targeted using conditions based on their status (anonymous, registered), the amount of their shopping cart or last quote, or their belonging to a marketing list, as defined in the Audience tab.

The content types, strategy types, and associated placements are the same for universal and rule-based posting. However, each rule within a rule-based posting has its own strategy type. Therefore, a rule-based posting can have multiple strategies, whereas a universal posting has one strategy applied to all visitors.

A rule-based posting specifies:

- Content type (Product Recommendation, Web Advertisement, and Web Offer)
- Maximum number of items to be displayed
- List of targeting rules; each rule for any content type consists of a list of conditions, a merchandising strategy, and a display priority
- Status

Note: You cannot create or update a rule with an existing priority. If a rule with an existing priority is created or updated, an error message appears.

3.1.6.3 Postings Content Types

Depending on the kind of content that suits your business, select a content type. For information on content types, see [Section 3.1.2, "eMerchandising Content"](#)

3.1.6.4 Maximum Number of Items

The maximum number of items denotes the items that the posting should return. The default is 1. If the merchandising strategy returns more number of items than the specified number of maximum items, then display priority determines the contents to display.

For example, you would like to make up to five product recommendations on the home page. Sometimes, a merchandising strategy may return fewer items than the specified number of maximum items, then display priority determines the contents to display.

If the merchandising strategy return more items than specified in this number, then only five products are displayed on the home page. Hence it is referred to as a maximum number.

3.1.6.5 Strategy

A merchandising strategy is an algorithm used to select the personalized content items to be returned by the posting. There are three Merchandising strategy types:

- [Section 3.1.6.5.1, "Manual Selection \(Specific List of Content Items\)"](#)
- [Section 3.1.6.5.2, "Predefined Relationships"](#)
- [Section 3.1.6.5.3, "Custom Strategies"](#)

3.1.6.5.1 Manual Selection (Specific List of Content Items) Based on the content type selected at the posting level, the eMerchandising administrator has access to a list of relevant content items and picks from those to create the list. Example: select a campaign to display amongst a given list.

3.1.6.5.2 Predefined Relationships This type of merchandising strategy leverages the association between content items and inventory products, as well as the item relationships between the inventory products, as defined in iStore or Inventory. The product relationships can be defined in the Inventory, iStore (on the merchant page), or Oracle Marketing (in the Product tab).

Example: display an ad related to a product cross-sell in the shopping cart content.

You may choose to have the merchandising strategy return:

- a. Content which is directly associated to a product context. Example: “Select the Web ads that are directly associated with the products on page.”
- b. Content which is associated to products that are linked to a product context by an item relationship. Example: “Select the Web Ads associated to the products up-selling the products in the cart.”

A product context can be one of the following:

- Products being viewed on the page
- Products in the active shopping cart

The association between a content item and an inventory product may be of a different nature based on the content type., as outlined in [Table 3–1](#).

Table 3–1 *Predefined Relationships*

Content Type	Association
Products	Self Example: Select the products up-selling the products in cart
Web Ads	Optionally defined in Oracle Marketing at the campaign schedule level.
Web Offers	Optionally defined in Oracle Marketing at the offer level.

The item relationships are those created in the Inventory module or on the iStore Merchant page. These relationships include, but are not limited to:

- Up-sell
- Cross-sell
- Substitute
- Related

3.1.6.5.3 Custom Strategies Merchants can create their own strategies beyond Manual and Product Relationship. They can incorporate the business priorities and the business priority order (ascending or descending) based on the:

- Product list price for the product recommendations
- Campaign priority, campaign schedule start date and end date for the Web Advertisements

- Offer start and end date for Web offers

For information on creating custom strategies, see the *Oracle Marketing Implementation Guide*.

Note: Sample custom strategy classes for all the three content types are shipped with Oracle Marketing. See the *Oracle Marketing Implementation Guide* for details.

3.1.6.6 Display Priority

Aside from showing the highest affinity content to a customer, a merchant wants to *push* content based on business drivers. This trade-off of affinity-based pull versus business driver-based push is achieved by imposing a prioritization criteria, or display priority, on the content items returned by the merchandising strategy.

Table 3–2 lists the display priorities.

Table 3–2 Display Priorities

Display Priority	Effect
None	Content is displayed in the order they were retrieved. This is the best performing display priority.
Random	This display priority enables content rotation when the user comes back to the same page. This also ensures equitable exposure of all content and prevents starving some content items of being exposure.
Prioritize Display By	Push content based on attributes (list price, campaign priority, and start/end dates) For example, a merchant displaying product recommendations on a store's page may want to display the products in ascending, descending order of the list price. Note: Offers that are created within last 30 days from the current date will only be selected. If offer start date is selected, then the offers are displayed depending on order ASC or DESC.

3.1.6.6.1 Display Priorities for Product Recommendations List Price is the seeded display priority that is shipped with eMerchandising. Following is a scenario outlining when this priority is appropriate.

Scenario: For a high-end customer a merchandiser may want to show high-priced products, thereby preserving the brand image of the store. For a

low-end customer a merchandiser may want to recommend affordable products to stimulate purchase and return visits.

3.1.6.6.2 Display Priorities for Web Ads Table 3–3 lists the display priorities available for Web Ads.

Table 3–3 Web Ads Priorities

Display Priority	Explanation
Schedule priority	In the schedule definition screen, a priority can be assigned to the schedule. Example: recommend the highest priority Web Ads first
Schedule start or end date	Example: recommend the latest Web Ads first

3.1.6.6.3 Display Priorities for Web Offers In case of Web offer, if a visitor clicks on an item with a discount, while execution the discount is applied to the item when it is added to the shopping cart.

Table 3–4 lists the display priorities available for Web offers.

Table 3–4 Web Offers Priorities

Display Priority	Explanation
Offer start or end date	Example: recommend the offers depending on the offer date

3.1.6.6.4 Use of Product Display Priorities in Other Scenarios If the merchandising strategy for a posting is of type Product Relationships, the strategy first selects products and then checks for the associated content type. In this case, you may want to prioritize the display not on content type attributes, but on the products priorities. Therefore, the display priorities for products should also appear in the list of available display priorities for this content type. For example, if you create a posting returning Web Ads related to products that cross-sell the content of the shopping cart, he may want to prioritize the display on the list price of the products instead of prioritizing along a Web display priority.

3.1.6.7 Rules

Rule-based postings consist of a list of ordered targeting rules. Each targeting rule, targets a particular visitor profile with a different merchandising strategy. A targeting rule specifies the following:

- Name
- Description
- Rule priority
- List of conditions
- Merchandising strategy
- Display priority

3.1.6.7.1 Rule Priority The rule priority is used by the eMerchandising engine at runtime to prioritize the targeting rules of a posting.

3.1.6.7.2 Default Content For a rule-based posting, Default content is defined at the posting level rather than at the Strategy Details, as in Universal Postings. This is because each Rule can have a different Strategy. The default content can be defined for a posting. If none of the rules return any content, Default Content is picked for display.

3.1.6.7.3 Conditions A rule may contain a combination of the following condition types:

- **Visitor Status:** if the Web site visitor is anonymous, registered with a purchase history, or registered without a purchase history
- **Shopping Cart Total:** where the dollar value in the shopping cart is compared against a numerical value specified in the rule condition
- **Segments and Lists:** if the visitor falls within the specified segments or lists
- **Custom:** you can define and implement them. For information on defining and implementing custom conditions, see the *Oracle Marketing Implementation Guide*.

The rule is executed only if all the conditions are true; in other words, all the conditions of a rule are linked with a 'Logical AND' operator. Each of these are represented in the Rule-Condition page in the user interface as sections (visitor status is the first section, shopping cart total is the second section, and so on). Each value specified within a section of the condition page has an OR operator, while among the entire group of sections the operator is AND.

For example, you can specify the condition as: Anonymous Visitor OR Registered without Purchase History AND has Shopping Cart Total greater than or equal to \$100 AND belongs to the Gold Customers segment OR belongs to the Platinum Customers segment Custom Conditions are that defined by your Administrator.

3.1.7 Associated Placements

The associated placements page of a posting displays all the places a posting is being displayed. The information that is displayed on each placement consists of: name, site, page, location, specialty store, tab, style, status, and creation date. Most of these fields are read-only, with the name being a hyperlink to the placement detail. You can specify what style will be applied to the posting/placement combination, thereby controlling how your content will be rendered. You can also indicate if this posting/placement combination is active or inactive, or remove the association altogether.

For information on associated placements, see [Section 3.2.2.9, "Using the Associated Placements Page"](#) and [Section 3.2.3.0.3, "Associating a Posting to a Placement"](#).

3.1.8 Runtime Actions

[Table 3–5](#) lists the runtime actions for a Universal Posting.

Table 3–5 Universal Postings at Runtime

Content Type	Strategy Type	Runtime Actions
Product Recommendation	Manual Selection	■ displays iStore product details and description ■ selects the list from Inventory ■ filter the list by maximum number of items to display and the display priority
Product Recommendation	Product Relationship	■ displays iStore product details and description ■ selects products based on their relationship to the products currently on the page or in shopping cart ■ subject to maximum number of items to display and display priority ■ Can include/exclude products currently on page provided the product: ■ belongs to the visitor’s iStore Specialty Store ■ is published in iStore

Table 3–5 Universal Postings at Runtime

Content Type	Strategy Type	Runtime Actions
Product Recommendation	Custom	retrieves all the products that are created within the defined number of days depending on the business priority
Web Ad	Manual Selection	■ selects a list of active Web ad campaign schedules of content type template that is either Web Image or Web Text ■ filter the list by maximum number of items to display and the display priority
Web Ad	Product Relationship	■ a list of campaign schedules depending on the selected relationship, the corresponding Web ads are displayed ■ selects Web ad campaign schedules associated to products with a relationship to the products currently on the page or in shopping cart ■ can include/exclude products currently on page ■ subject to maximum number of items to display and display priority provided: ■ the visitor belongs to a segment or target group associated with the Web ad campaign schedule ■ current date must be within campaign schedule start/end dates
Web Ad	Custom	retrieves all the Web ads that are created within the defined number of days depending on the business priorities and priority order
Web Offer	Manual Selection	■ displays the content defined for the offer ■ selects the list from Inventory ■ filter the list by maximum number of items to display and the display priority

Table 3–5 Universal Postings at Runtime

Content Type	Strategy Type	Runtime Actions
Web Offer	Product Relationship	- displays the content defined for the offer in iStore - selects products based on their relationship to the products currently on the page or in shopping cart - subject to maximum number of items to display and display priority - can include/exclude products currently on page provided the product: - belongs to the visitor's iStore Specialty Store - is published in iStore
Web Offer	Custom	displays the content defined in iStore, Partners Online, and affiliates retrieves all the offers that are created within the defined number of days depending on the business priorities and priority order

As a rule-based posting consists of a set of one or more rules, first the rules' conditions or criteria are to be met. Once the conditions are met, the strategy type determines what content is displayed. The strategy types are the same as those used in a universal posting. The following runtime actions takes place before applying the strategy:

- Evaluate conditions for highest priority rule
- If the conditions are false, it picks the next rule in the order of priority
- If the conditions are true, then apply the strategy
- If the number of items returned is less than the maximum number, evaluate the next rule in order of priority

Associate products and segments of the Web ad campaign schedule is used as part of the strategy for displaying content to visitors. The associated products will be used in the strategy type product relationship to determine what Web ads to display based on the associated products' relationship to the products in the shopping cart or on the page.

The associated segments will be used to validate that a visitor is in an associated segment before displaying content from a particular campaign schedule. The campaign schedule segment is intersected with the segment conditions in a rule-based posting. That is, the visitor must fall into both the segment(s) associated with the campaign schedule as well as the segment(s) specified in the rule condition.

For rule-based runtime actions, see Runtime Action column in [Table 3–5](#).

Note: When an advertisement is displayed on a corporate site (recommended by the runtime engine), the embedded URL may link to a restricted specialty store in Oracle iStore. If a user does not have access privilege to the specialty store, then a warning message appears. This is because the specialty store information for the content is defined when the content is created and not at runtime when the advertisement is displayed.

To avoid this scenario, you can use a manual selection strategy and select advertisements on specialty stores that provide unrestricted access to all users.

3.1.9 Understanding Web Placements

A Web placement is a logical representation for a physical space on an application page, where some content (returned by a posting) is displayed. It is identified by a site, a page, a location, and eventually some page parameters. You can activate a placement once you assign a posting and style to display.

Site

A site is an Oracle e-Business suite application or any other HTML site which is using eMerchandising to display personalized content.

eMerchandising is shipped with seeded sites out-of-the-box (iStore and Partners Online) and a screen will be available to register new sites.

Page

A page in eMerchandising may represent a unique page in an application or a template, based on how you want to classify their placements. In the case of iStore, pages are logical templates as defined in the 'Templates' tab of the iStore Merchant UI.

Merchants can register the pages in Administration. For iStore pages, they must select the iStore templates they want to use. For non iStore pages, they must enter a page name and a description.

Out-of-box iStore Pages

iStore pages are treated as default, and come seeded with the application. The following iStore pages are provided:

- Section pages
- Product Detail pages
- Shopping Cart page

Location

The location designates the place in the page where the placement is situated. There are fifteen seeded values for the location out-of-the-box:

- Top Center
- Right 1 to Right 7
- Left 1 to Left 7

The application is shipped with out-of-box placements for the 15 above locations in the seeded store pages (listed in out-of-box iStore pages). Also, the administration screens contain the list of predefined placements.

Refer to the *Oracle Marketing Implementation Guide* for information on registering a new location.

3.1.9.1 iStore Placements

The following are the main iStore concepts applicable to eMerchandising:

- **Product Details:** The Product Details page is displayed to the visitor on clicking the product. It refers to the detailed description of a particular product and can include a text description and an image of the product.
- **Specialty Stores:** These are different stores within a single instance for serving different customer segments. Each store can have its own product selection, user interface and process flows, while all stores can leverage a unified, central merchant administration and product and content repository.
- **Multimedia Components:** These are used to enhance the presentation of products to iStore visitors. Examples of multimedia files could be a picture of a

certain size, audio of a certain length, animation sequence or text. iStore supports logical groupings of several multimedia components that can be rendered based on the selected specialty store and language combination.

- **Bins:** These can be described as content containers within iStore.

In eMerchandising, you can create placements that are associated to the iStore bins that are enabled. Placements can be created for each specialty store and each tab.

The following example explains the rules for iStore placements for Specialty store and Tab; where, Page is Product Details and Location is Left Bin 3:

Table 3–6 Example for Specialty Store and Tab

Specialty Store	Tab	Posting	Priority
Vision.com	Home	P1	1
Vision.com	Any	P2	2
Any	Home	P3	3
Any	Any	P4	4

Note: Defined values have priority over Any and Specialty store have priority over Tab.

- If visitors are on the Vision.com Specialty Store and the Home tab, they get the P1 posting.
- If visitors are on the Vision.com Specialty Store and any tab other than Home, they get the P2 posting.
- If visitors are on any Specialty Store and the Home tab, they get the P3 posting.
- If visitors are any Specialty Store and any tab, they get the P4 posting.

3.1.9.2 Partner Portal Placements

With eMerchandising, you can display personalized Web ads and offers on the home page of the Partner Portal of Oracle Partners. The two seeded placements for the partner portal are the top and bottom of the Home page.

The profile PV: Enable Web Marketing globally controls the use of eMerchandising on Oracle Partners. Set profile option to Yes at Site, Application and Responsibility. For details, see the *Oracle Marketing Implementation Guide*.

3.1.9.3 Other Placements

A placement can be used on other corporate sites to personalize content based on legacy customer data that is not stored in Oracle Applications.

Sites that implement Oracle Marketing (not a third-party company) can create segments in Oracle Marketing. The segments can be re-used in a rule-based posting to personalize Web advertisements on corporate web sites or an employee portal built with Oracle Portal.

3.1.10 Extending eMerchandising

eMerchandising provides you the flexibility to create your own custom conditions and strategies. It also allows you to create your own pages, sites, and styles. This can be done in the Administration tab of Oracle Marketing. After creating these custom conditions, strategies, page, style, and sites, you need to implement them to use them effectively. For more information on creating and implementing these, see the *Oracle Marketing Implementation Guide*.

3.2 eMerchandising User Procedures

Use the following procedures to manage your content, posting and placements:

- [Section 3.2.1, "Managing eMerchandising Content"](#)
- [Section 3.2.2, "Managing Postings"](#)
- [Section 3.2.3, "Managing Placements"](#)

3.2.1 Managing eMerchandising Content

The following procedures are explained in this section:

- [Section 3.2.1.1, "Creating Web Advertisements"](#)
- [Section 3.2.1.2, "Creating Web Offers"](#)
- [Section 3.2.1.3, "Creating Products Media"](#)
- [Section 3.2.1.4, "Creating Product Relationships"](#)
- [Section 3.2.1.5, "Associating a Template with iStore Bin"](#)

3.2.1.1 Creating Web Advertisements

Use the following procedures to create Web ads:

- [Section 3.2.1.1.1, "Creating a Campaign Schedule of type Internet Advertisement"](#)
- [Section 3.2.1.1.2, "Creating Content"](#)

3.2.1.1.1 Creating a Campaign Schedule of type Internet Advertisement Use this procedure to create Campaign Schedule.

Note: This procedure does not list all the steps to create a campaign schedule. The fields that are specific to Web ads are only mentioned. For information on creating a campaign schedule, see [Section 2.2.5.1, "Creating a Campaign Schedule"](#).

Prerequisites

An active campaign exist

Steps

1. Navigate to Campaign > Campaigns.
2. Click the Campaign link to display the Campaign Details Page.
3. Navigate to Execution > Campaign Schedules.
The Campaign Details - Campaign Schedule page appears.
4. Click Create.
The Create Campaign Schedule page appears.
5. From the Setup Type drop-down list, select Internet Advertisement.
6. Enter a Name for the Campaign Schedule.
7. Enter all the required details.
8. Click Create.
The Campaign Schedule Details page appears.
9. Click Request Approval, to change the status to Active.
The Preview Approval page appears.
10. Select the User Status as Active.
11. Click Confirm.

3.2.1.1.2 Creating Content Use this procedure to create content for a campaign schedule.

Prerequisites

An active campaign and campaign schedule exist.

Steps

1. Navigate to Campaign > Campaigns.
2. Click the Campaign link to display the Campaign Details Page.
3. Click the Campaign Schedule link.
4. Navigate to Execution > Content.
5. Click Create.
The Create Content page appears.

6. In the Type, select Web Image or Web Text.
7. Select Subtype from the LOV.
8. Enter text in Display text.
9. Select a Language from the LOV.
10. Select an Action for the click-through destination.
11. Select an address for the URL. For example, <http://www.iStore.com>
12. Select the Track check box to log the interactions.
13. Click Create.

3.2.1.2 Creating Web Offers

Use the following procedure to create Web offers.

- [Section 3.2.1.2.1, "Creating a Campaign Schedule of type Internet Promotion"](#)
- [Section 3.2.1.2.2, "Creating Offers"](#)
- [Section 3.2.1.2.3, "Associating Offers to Campaign Schedule"](#)

3.2.1.2.1 Creating a Campaign Schedule of type Internet Promotion Use this procedure to create Campaign schedule.

Note: This procedure does not list all the steps to create a campaign schedule. The fields that are specific to Web offers are only mentioned. For information on creating a campaign schedule, see [Section 2.2.5.1, "Creating a Campaign Schedule"](#).

Prerequisites

An active campaign exist

Steps

1. Navigate to Campaign > Campaigns.
2. Click the Campaign link to display the Campaign Details Page.
3. Navigate to Execution > Campaign Schedules.
The Campaign Details - Campaign Schedule page appears.
4. Click Create.

The Create Campaign Schedule page appears.

5. From the Setup Type drop-down list, select Internet Promotion. You must select Request Only check box to select the content for Internet Promotions.
6. Repeat steps 6 to 11 as listed in [Section 3.2.1.1.1, "Creating a Campaign Schedule of type Internet Advertisement"](#).

3.2.1.2.2 Creating Offers Use this procedure to create offers.

Prerequisites

Active campaign schedule exist

Steps

1. Navigate to Campaign > Campaigns.
2. Click the Campaign link to display the Campaign Details Page.
3. Click the Campaign Schedule link.

The Campaign Schedule Details page appears.

4. Navigate to Execution > Offers.
The Campaign Details - Offers page appears.
5. Click Create Offers.
6. Select a Setup Type from the LOV.
7. Enter a name in Offer Name.
8. Select the Request Only check box.
9. Select Discount Level as Line from the LOV.
10. Click Create.

11. Enter Qualifiers and Discount Rules.
12. Click Request Approvals.

The preview Approval page appears.

13. Click Confirm.
14. Navigate to Execution > Offers.
The Offer Detail - Content page appears.

15. Click Create.

16. Follow step 5 to 12 as explained in [Section 3.2.1.1.2, "Creating Content"](#).

3.2.1.2.3 Associating Offers to Campaign Schedule Use this procedure to associate offers to a campaign schedule.

Prerequisites

- Active campaign schedule of type Internet Promotion exist

Steps

1. Navigate to Campaign > Campaigns.
2. Click the Campaign link to display the Campaign Details Page.
3. Navigate to Execution > Campaign Schedule.
The Campaign Details - Campaign Schedule page appears.
4. Click the Campaign Schedule link.
The Campaign Schedule Details page appears.
5. Navigate to Execution > Offers.
The Campaign Schedule Details - Offers page appears.
6. Click the Search icon to associate the offer you have selected to the Campaign Schedule.
7. Select the offer from the list.
8. Click Update.

3.2.1.3 Creating Products Media

Multimedia components are used to enhance the presentation of products to iStore visitors. Examples of multimedia files could be a picture of a certain size, audio of a certain length, animation sequence or text. iStore supports logical groupings of several multimedia components that can then be rendered based on the specialty store and language combination. See Oracle iStore documentation for details.

3.2.1.4 Creating Product Relationships

See, [Section 2.2.9.8, "Creating Product Relationships"](#).

3.2.1.5 Associating a Template with iStore Bin

Use this procedure to associate a template with a iStore Bin.

Prerequisites

Check if IBE: Use Web Placement profile is set to Yes. See the *Oracle Marketing Implementation Guide* for details.

Steps

1. Log on to iStore as an Administrator.
2. Navigate to Advanced tab.
3. Click the Template Manager horizontal navigation link.
The Templates page appears.
4. Search for the templates containing the word "bin". A list of bins is returned.
5. Select the bin to update.
The Update Template page appears.
6. Click Add Source File.
The Add Page Source File page appears.
7. Enter the source name as `amsWebPlacement.jsp`.
8. Select a store and language from the LOVs.
9. Click Apply.

3.2.2 Managing Postings

- [Section 3.2.2.1, "Creating Universal Postings"](#)
- [Section 3.2.2.5, "Updating Universal Postings"](#)
- [Section 3.2.2.6, "Creating Rule-Based Postings"](#)
- [Section 3.2.2.7, "Updating a Rule-based Posting"](#)
- [Section 3.2.2.8, "Deleting Postings"](#)
- [Section 3.2.2.9, "Using the Associated Placements Page"](#)

3.2.2.1 Creating Universal Postings

A Web posting is an object used to define the personalized content that is dynamically selected and displayed to at runtime in a placement. The content returned by the posting to the visitor at runtime is dependent on the content type and the merchandising strategy selected by the Web merchandiser.

Use the following procedures to create a Universal Posting:

- [Section 3.2.2.2, "Entering Universal Posting Details"](#)
- [Section 3.2.2.3, "Entering Strategy Details"](#)
- [Section 3.2.2.4, "Selecting Display Priority"](#)

3.2.2.2 Entering Universal Posting Details

Use this procedure to enter details for a universal posting.

Prerequisites

None

Steps

1. Navigate to Execution tab.
2. Click the Web Postings horizontal navigation link.
The Web Posting page appears.
3. Click Create.
The Create Posting page appears.
4. Enter the name and description of the posting, as well as the following posting's attributes:

- a. Select Posting Type as Universal.
 - b. Enter a Posting Name.
 - c. Enter a Display Name.
 - d. Status is Active by default.
 - e. Select the Content Type.
5. Select a merchandising strategy.
6. Click Create.

3.2.2.3 Entering Strategy Details

Use this procedure to enter strategy details for a universal posting.

Prerequisites

An existing universal posting with posting details

Steps

1. Navigate to Execution tab.
2. Click the Web Postings horizontal navigation link.
The Web Posting page appears.
3. Click the universal posting.
The Universal Posting Details page appears.
4. Click the Strategy Details side navigation link. The options displayed are dependent on the selected Strategy type.
 - If the selected strategy is Product Relationship:
 - * Select the shopping context and the type of relation for the product in the shopping cart or page. For example, select Cross-Sell as shopping context and page as Products on Page.
 - * Select a value from the Filter Contents LOV, to filter the products to be displayed.
See [Section 3.1.6.5.2, "Predefined Relationships"](#) for details.
 - If the strategy is Custom Selection:
 - * Select a product strategy that is created in Administration tab.

- If the strategy is Manual Selection:
 - * Click Add Contents. The Product Selector page appears.
 - * Select the content.
 - * Click Done.
- 5. Optionally, enter default content description.

Note: If default content is entered and no criteria is met to return the items, then the default content is displayed to the visitor.
- 6. Click Update.

3.2.2.4 Selecting Display Priority

Use this procedure to enter display details for a universal posting.

Prerequisites

A universal posting with posting details exist

Steps

1. Navigate to Execution tab.
2. Click the Web Postings horizontal navigation link.

The Web Posting page appears.
3. Click the universal posting.

The Universal Posting Details page appears.
4. Click the Strategy Details side navigation link.
5. Select one of the display priority radio buttons.
 - Click None to not have a display priority; the contents will be displayed in the order they were added.
 - Click Random to randomly display the contents, each time the page is refreshed.
 - Click Prioritize Display numerically ranks attributes associated to the content type of the Posting:
 - * For Content Type Product Recommendation, the content is displayed in ascending or descending order of the list price.

- * For Content Type Web Advertisement, the content is displayed in ascending or descending order of the campaign priority, start date, or end date.
- * For Content Type Web Offer, the content is displayed in ascending or descending order of the offer start and end date.

6. Click Update.

3.2.2.5 Updating Universal Postings

A Web merchandiser wants to update an existing universal posting. For example, the Web merchandiser wants to modify the list of campaigns that are returned by the posting, or wants to modify some parameters of the posting's merchandising strategy.

Use this procedure to:

- Change the status of the posting
- Modify the number of items returned by the posting
- Modify the parameters of the merchandising strategy
- Re-prioritize the content

Prerequisites

- The posting already exists.
- If you want to change the status from Active to Inactive, the posting has to be unassigned from the placements that are currently using it.

Steps

1. Click the hyperlinked Posting Name for Posting Type "Universal".
The Universal Postings Details page appears.
2. Click the Web Postings horizontal navigation link.
The Web Posting page appears.
3. Click the posting to be updated.
4. The following posting's attribute can be modified:
 - Posting Name
 - Display Name

- Description
- Status
- Maximum number of items to be displayed
- Merchandising strategy and its parameters
- Product filter when applicable
- Display priority

5. Click Update.

3.2.2.6 Creating Rule-Based Postings

Use the following procedures to create a Rule-based posting:

- [Section 3.2.2.6.1, "Entering Rule-based Posting Details"](#)
- [Section 3.2.2.6.2, "Entering Rules Details"](#)
- [Section 3.2.2.6.3, "Entering Strategy Details"](#)
- [Section 3.2.2.6.4, "Entering Conditions Details"](#)

3.2.2.6.1 Entering Rule-based Posting Details Use this procedure to create a new rule based posting.

Prerequisites

Content is created

Steps

1. Navigate to Execution tab.
2. Click the Web Postings horizontal navigation link.
The Web Posting page appears.
3. Click Create.
The Create Posting page appears.
4. Enter the name and description of the posting, as well as the following posting's attributes:
 - a. Posting Type as Rule-Based.
 - b. Posting Name.

- c. Display Name.
 - d. Status is Active by default.
 - e. Content Type.
 - f. Maximum number of contents to be displayed, default is one.
5. Click Create.

3.2.2.6.2 Entering Rules Details The rule priority is used by the eMerchandising engine at runtime to prioritize the targeting rules of a posting. Use this procedure to define rules for rule-based postings.

Prerequisites

A rule based-posting is created.

Steps

1. Navigate to Execution tab.
2. Click the Web Postings horizontal navigation link.
The Web Posting page appears.
3. Click the rule-based posting.
The Rulebased Posting Details page appears.
4. Click the Rules side navigation link.
The Rulebased Posting - Rules page appears.
5. Optionally, select a default content.
6. Click Create.
The Create Rule page appears.
7. Enter a rule name.
8. Enter a description.
9. Enter a rule priority (any value between 0-99).
Note: Rules within a posting must have unique priority.
10. Select a strategy type.
11. Click Create.

3.2.2.6.3 Entering Strategy Details Use this procedure to enter strategy details for a rule-based posting.

Prerequisites

A rule-based posting with a rule exist

Steps

1. Navigate to Execution tab.
2. Click the Web Postings horizontal navigation link.
The Web Posting page appears.
3. Click the rule-based posting.
The Rulebased Posting Details page appears.
4. Click the Rules side navigation link.
5. The Rulebased Posting - Rules page appears.
6. Click the rule name link.
7. The Rule Details page appears.
8. Click the Strategy Details side navigation link.
9. Follow step 4 to 6 as listed in [Section 3.2.2.3, "Entering Strategy Details"](#).

3.2.2.6.4 Entering Conditions Details A rule may contain a combination of the following condition types. The rule is executed only if all the conditions are true; in other words, all the conditions of a rule are linked with a logical AND operator. Use this procedure to enter conditions for a rule-based posting.

[Table 3–7](#) list the fields used to define and describe the targeting rule conditions:

Table 3–7 Targeting Rules Conditions

Condition	Function
Visitor Status	Checks if the visitor is: ■ Anonymous ■ Registered without Purchase History ■ Registered with Purchase History This allows you to use different merchandising strategies to anonymous or registered user or to offer a special offer to a visitor who registered to the store but has not bought anything yet.
Shopping Cart Total	This condition allows you to compare the total amount of the active shopping cart to a value specified in the default currency (as defined in the Administration screen). This allows you to define rules, such as, “If visitor’s shopping cart amount is greater than \$1,000 display the high-end product line advertisements.”
Segments and Lists	This condition allows you to select a set of segments and lists as defined in the Audience tab of Oracle Marketing. Lists are a combination of segments, workbooks and other lists. At runtime, the eMerchandising engine checks if the visitor is part of at least one of the selected segments or lists. This allows you to define rules, such as, “If the visitor is part of the 18-25 year-old or 26-35 year-old segment, then recommend the following list of products.”
Custom Conditions	eMerchandising allows you to implement your own custom conditions. Merchants can create Java classes that will implement their custom conditions. Then, they will have to register these classes in the Oracle Marketing Administration tab, which will make their custom conditions available to use in the conditions list of a targeting rule.

Prerequisites

A rule-based posting with a rule exist

Steps

1. Navigate to Execution tab.
2. Click the Web Postings horizontal navigation link.
The Web Posting page appears.
3. Click the rule-based posting.

The Rulebased Posting Details page appears.

4. Click the Rules side navigation link.

The Rulebased Posting - Rules page appears.

5. Click the rule name link.

The Rule Details page appears.

6. Click the Conditions side navigation link.

The Rule - Condition page appears.

7. Select a visitor status condition.

8. Select a shopping cart total condition.

9. Select segments and list conditions.

10. Select custom conditions.

11. Click Update.

3.2.2.7 Updating a Rule-based Posting

Use this procedure to update an existing rule-based posting. For example, if you want to modify a targeting rule part of the posting, or parameters of one of the rules' merchandising strategy.

Prerequisites

- The posting already exists.
- If content items are added to a specific list of content items, the new items have been created.
- If you want to change the status from Active to Inactive, the posting must be unassigned from the placements that are currently using it.

Steps

1. Navigate to Execution tab.

2. Click the Web Postings horizontal navigation link.

The Web Posting page appears.

3. Click the rule-based posting link.

The Rulebased Posting Details page appears.

4. Modify any of the following fields, as needed:
 - Posting Name
 - Display Name
 - Description
 - Status
 - Maximum number of items to be displayed
5. Create or modify your rules, as needed. The fields you can modify include:
 - Rule name, description, and rule priority
 - Conditions
 - Strategy type or the strategy parameters

Note: If the rule priority matches the existing priority, an error message appears that the priority already exist.
6. Click Update.

3.2.2.8 Deleting Postings

Use this procedure when you want to remove a posting no longer in use. The system automatically validates that the posting is not assigned to any placement.

Prerequisites

The posting is not assigned to any placements.

Steps

1. Navigate to Execution tab.
2. Select a Rule Based Posting or Universal Postings, as desired.
3. Select the Remove check box adjacent to the posting name.
4. Click Update.

3.2.2.9 Using the Associated Placements Page

Use this procedure to display all the places a posting is being displayed.

Prerequisites

A posting exist and is assigned to any placement.

Steps

1. Navigate to Execution tab.
2. Click on the posting link that is associated to a placement.
The Web Posting page appears.
3. Click the Associated Placement side navigation link.
The Associated Placement page appears listing all the placement the posting is associated with.
4. Click on any placement link to view and edit placement details.
5. Click Update to update the placement details.
6. Use the Back button on the navigator to come to Associated Placement page.

3.2.3 Managing Placements

Use the following procedures to manage placements:

- [Section 3.2.3.0.1, "Creating a Placement for iStore"](#)
- [Section 3.2.3.0.2, "Creating a Placement for Sites other than iStore"](#)
- [Section 3.2.3.0.3, "Associating a Posting to a Placement"](#)

3.2.3.0.1 Creating a Placement for iStore Use this procedure to create a placement for iStore.

Prerequisites

An existing site, page, style, and location

Steps

1. Navigate to Execution tab.
2. Click the Web Placement horizontal navigation link.

The Web Placement page appears.

3. Click Create.

The Create Web Placement page appears.

4. Select a placement name.
5. Select the Status as Inactive.
6. Select the site as iStore from the LOV and allow the page to refresh.
7. Select the page and location the LOVs.
8. Select the specialty store from the LOV and allow the page to refresh.
9. Select the tab from the LOV.
10. Click Create.

3.2.3.0.2 Creating a Placement for Sites other than iStore Use this procedure to create a placement for a site other than iStore.

Prerequisites

An site, page, style, and location exist

Steps

1. Navigate to Execution tab.
2. Click the Web Placement horizontal navigation link.
The Web Placement page appears.
3. Click Create.
The Create Web Placement page appears.
4. Select a placement name.
5. Select the Status as Inactive.
6. Select the site a site other than iStore from the LOV and allow the page to refresh.
7. Select the page and location the LOVs.
8. Click Create.
9. Click ViewAPI Call Details link.

10. Copy the API call details and paste in the affiliate.

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 -->
```

11. Copy the API call details and paste in affiliates.
12. Call the html page from the browser to post the placement.
13. Click Update.

3.2.3.0.3 Associating a Posting to a Placement Use this procedure associate a posting to a placement.

Prerequisites

An existing site, page, style, and location

Steps

1. Navigate to Execution tab.
2. Click the Web Placement horizontal navigation link.
The Web Placement page appears.
3. Click the placement link to associate a posting.
4. Change the status to Active.
5. Select the posting by clicking the search icon.
6. Select a style for the placement.
7. Click Update.

3.3 Troubleshooting

My postings are not displayed

- Check if all the mandatory steps in the implementation guide for Oracle Marketing are complete.
- If you are implementing iStore, check if all the necessary steps given in the Oracle Marketing Implementation guide are complete and the JSP is associated to bin.
- If postings are not displayed on iStore, make sure the profile IBE: Use Web Placements is set to Yes at the application level for iStore and bounce the apache.
- Make sure that the status of the posting is “Active”.

My posting of content type Web Advertisement is not displayed

- Check the Campaign and Campaign Schedule start and end date.
- Check if the Campaign and Campaign Schedule status is Active.
- Check if the content is attached to the Campaign Schedule. Click the preview button to see the attached image.

My posting of content type Web Offer is not displayed

- Check if the Posting is active.
- Check if the offer is active.
- Check the posting start and end date.
- Check if the request only flag is selected.
- Check if QP: Source System Code is set to Oracle Marketing at the application level.

My posting with content type Product Recommendation is not displayed

- Make sure the appropriate style sheet is chosen and the image/text for the style sheet exists. For example, a product thumbnail stylesheet may be selected but the thumbnail image may not be defined for the product.

My Rule-based posting is not displayed

- If the posting has a segment attached to the condition, run 'AMS: Refresh party market segments' concurrent program.
- Check if all the all the conditions are met, otherwise, the posting will not be displayed. For example, a user may be registered without a purchase history but may not be part of the attached list.

My posting with Strategy type Product Relationship is not displayed

- Check if the relationship exists in iStore. For example, if the recommendation on the page is for Cross sell, cross-sell products must be defined for the page and the correct filter must be chosen.

My Posting does not display the image

- Check if the image is uploaded. You can upload the image in the content definition screen.

My Posting are not displayed in iStore

- Check if all the necessary steps given in the Oracle Marketing Implementation guide are complete and the JSP is associated to bin.
- Make sure the profile IBE: Use Web Placements is set to Yes at the application level for iStore and bounce the apache.
- For a posting with strategy type Product Relationship is the not displayed, check if the relationship exists in iStore. For example, if the recommendation on the page is for cross-sell, cross-sell products must be defined for the page and the correct filter must be chosen.
- Make sure the products that are recommended are part of the minisite.
- If section filtering is defined, make sure the product is part of the section also.

My Offers are not displayed

- Make sure the profile: QP: Source System Code is set to Oracle Marketing at the Application level.

My Web Placement is not displayed

- Make sure the status is Active.

- If the call is from an HTML or JSP application, make sure the site, page, and location parameters that are passed match the definition parameters of the placement.
- It is possible that the Placement runtime engine is picking up a different placement than the one you are interested in because that placement may not match the site, page and location parameters more aptly.

My placement is not using the new stylesheet I have defined

- Copy the newly defined stylesheet to the OA_HTML directory.
- If the Placement is for a shopping cart page on iStore, the location must be either 'TOP' or 'BOTTOM'. No other locations work for this page.

The image is not appearing in the affiliate site

- Make sure the profile AMS: Server URL is set correctly. The format is `http://hostname:portnumber`.

My placement on iStore is not displayed

- Make sure that the jsp, `amsWebPlacement.jsp` is associated to the appropriate bin. Also, make sure in the templates detailed design page, “All” is selected from the Specialty drop-down list.

My placement on Oracle Partners is not displayed

- Make sure that the profile value PV:Enabling Web Marketing is set to Yes.

General Tips:

Make sure the following concurrent programs are run successfully:

- AMS Web Execution: Campaign Items Refresh Program
- AMS Web Execution: Refresh Offer Parties and Products
- AMS Web Execution: Specialty Store Items Refresh Program
- AMS: Refresh party market segments (for segment condition only)

Using Data Mining

This chapter describes the concepts and procedures related to the Data Mining functionality of Oracle Marketing. Sections include:

- [Section 4.1, "Understanding Data Mining"](#)
- [Section 4.2, "Data Mining User Procedures"](#)

4.1 Understanding Data Mining

Data mining is a process used to discover strong patterns and relationships in large amounts of data. These patterns and relationships are used to more accurately predict the behavior of customers and prospects.

For example, you can use data mining within Oracle Marketing to predict customer behavior for a variety of purposes, such as identifying which customers are most likely to:

- Respond to your marketing campaign
- End their relationship with your organization

Effective data mining enables you to make better business decisions. You can more effectively apply your marketing budget by targeting only the strongest prospects, thereby driving up margin.

The data mining process consists of the following general steps and concepts:

1. Building a *model*

A model is a set of rules that can be used to predict the value of a specific customer attribute (the *target field*) based on the known values of other attributes.

Building a model is the process of using data mining algorithms to create a model that is based upon the *training data* it is supplied. The training data is historical information about existing customers. This information consists of the known values for customer attributes such as direct mail responder, income, age, gender and so on.

Oracle Marketing provides seeded model types (three response and one loyalty/retention model) to help automate the data mining process. Custom model types that predict any customer behavior can also be implemented.

2. Evaluating model results

Three reports are generated automatically when a model is built: Lift Chart, Performance Matrix, and Attribute Importance. By evaluating this information, you can determine the accuracy of the model and make adjustments to the training data that will improve the performance and predictive power of the model.

3. *Scoring* a target population

The process of scoring is also referred to as executing a scoring run. During a scoring run, a model is used to predict the future behavior of a target

population. The score assigned to each customer record in the target population indicates the likelihood that this customer will exhibit a particular behavior. For example, customer A may be scored with a 90% probability of responding to a particular e-mail campaign.

4. Viewing the scoring run results and generating a list

The scoring run results are presented as a continuous range of 10 deciles. Each decile has an associated percentage range (for example, 80–89.99%). The percentage indicates the likelihood that the customers within a particular range will exhibit the target behavior.

From the scoring run results page, you can generate lists of customer records. The breakdown into deciles allows you to narrow your target population and select only the customers who exhibit the targeted behavior.

Each of the steps above is described in more detail in the following sections:

- For more information about model types and model building, see these sections.
 - For an overview, see [Section 4.1.1, "Understanding Model Building"](#).
- For more information on evaluating model results, see
 - [Section 4.1.2, "Understanding Model Evaluation"](#)
 - [Section 4.1.3, "Improving Model Results"](#)
- For more information on scoring a target population and scoring run results, see
 - [Section 4.1.4, "About Scoring a Target Population with Your Model"](#)
- For more information on generating lists, see
 - [Section 4.1.5, "Generating a List"](#)

4.1.1 Understanding Model Building

The process of building a model consists of these steps:

1. Creating the model by selecting a
 - Model type
 - Target
2. Selecting your training data
3. Building (training) the model

The target comprises a target field and a data source. The data source is implied through the model type and target field association.

4.1.1.1 About Model Types

Oracle Marketing models are also referred to as *predictive* models. They are built using the Naive Bayes algorithm, which can predict binary or multi-class outcomes. Currently in Oracle Marketing, this algorithm is used to predict the binary outcomes of a target field.

For example, you might want to predict which customers are likely to respond to a direct marketing campaign. The possible values for the target field would be yes or no.

The following model types are included with the application and are designed to automate the model building process.

- Response models
 - E-mail
 - Direct Mail
 - Telemarketing
- Loyalty/Retention model
- Custom model

A description of each model type is provided in the following table.

Table 4–1 Model Types

Model Type	Description
Response	Use these three model types (e-mail, telemarketing, and direct mail campaigns) to predict which customers and prospects are most likely to respond to the corresponding marketing activity.
Loyalty/Retention	Use this model to predict which customers are highly likely to end their relationship with your organization.
Custom	Use this model to predict any type of customer behavior within the Oracle customer model (TCA) or a user-defined data source. The target behavior must be based on a data attribute that is binary (yes or no) in nature.

4.1.1.2 About Data Sources and Targets

When creating a model, you must select a data source and a target. A data source consists of a flexible set of customer attributes that are evaluated by the data mining engine. The data mining engine determines which attribute values correlate with the target behavior (yes or no).

A target field is a column in the data source that represents the customer behavior you are trying to predict. A target is an association of model type, data source, and target field. Selecting the target while creating a model automatically selects the target field. For example, your System Administrator might define a target called Home Ownership that is mapped to a column in a specific user-defined data source with the name Own Rent Flag.

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).

User-defined data sources and target fields can be set up by your System Administrator. System Administrators should also know the attributes present in these data sources.

Oracle Marketing provides two seeded data sources for each model type: TCA Persons for B2C models, and TCA Organization Contacts for B2B models. Both of these data sources are associated with customer data from the Oracle customer model (TCA). See the *Oracle Marketing Implementation Guide* for a complete list of attributes included in the seeded data sources.

The following table lists the seeded targets and data sources provided by Oracle Marketing for the Response and Loyalty/Retention model types. For Custom model types, your System Administrator must define the associated target fields and data sources. They can also create additional data sources and targets for Response and Loyalty/Retention models.

Table 4–2 Seeded Target Fields and Data Sources

Model Type	Data Source	Targets
Direct Mail Response	TCA Organization Contacts	B2B: Direct Mail Responders
	TCA Persons	B2C: Direct Mail Responders
E-Mail Response	TCA Organization Contacts	B2B: E-Mail Responders
	TCA Persons	B2C: E-Mail Responders
Telemarketing Response	TCA Organization Contacts	B2B: Telemarketing Responders
	TCA Persons	B2C: Telemarketing Responders
Loyalty/Retention	TCA Organization Contacts	B2B: Loyalty/Retention
	TCA Persons	B2C: Loyalty/Retention
Custom	None. Must be set up by your System Administrator.	

4.1.1.3 About Training Data

In data mining, a model requires a data set from which to learn and build the model. The data set is referred to as the *training data* and the process of learning is referred to as *training* the model.

Training data consists of organizations contacts or individuals that you select. It should consist of members:

- Whose characteristics closely resemble the target population that will be scored with the model.
- Whose behavior and responses are known.

The more similar the training data is to the target population, the greater the predictive power of the model. For example, if you want to conduct a telemarketing campaign for consumers, then you would train the model using data that consists of consumers targeted by a similar telemarketing campaign in the past, and whose response to the campaign is known.

Note: If historical information from a similar campaign is not available, you must create and execute a test campaign before you can build a model.

4.1.1.4 About Model Building

As mentioned above, model building is the process of training the model using a data set that you have selected. During model building, the data set is divided into two parts: *input data* (70% of the training data set) and *holdout* or *test data* (30% of the training data set). For more information on the test data and how it is used, see [Section 4.1.2, "Understanding Model Evaluation"](#).

The data mining engine uses the input data to discover relationships and patterns to build a set of rules. Depending upon the target field and data source selected, the application may examine the following:

- For a seeded data source, more than 150 customer attributes that comprise the Oracle customer model (TCA). See the *Oracle Marketing Implementation Guide* for a complete list of attributes.
- A variety of customer attributes that contain customer information from a user-defined data source.

The attributes examined can include demographic information such as age, gender, and income. Historical data can include information such as the number of times a customer has been contacted, number of past purchases, and the number of service requests they have opened. It can also include data collected using your Customer Relationship Management (CRM) applications, or data that you have purchased from outside vendors and imported into the database.

Different types of models are trained on different subsets of attributes depending upon the target audience. Here are some examples.

- A response model targeting organization contacts through a telemarketing campaign may examine data such as the number of employees in the organization, annual revenue, and business transaction history. A response model for a telemarketing campaign targeting individuals might instead examine detailed personal information such as age, household income, and personal transaction history.
- A loyalty/retention model will examine the attributes of customers who have and have not placed an order with your organization in the last three months.

4.1.2 Understanding Model Evaluation

The accuracy of the model is determined by evaluating the results of the model build. The evaluation is performed by applying the set of rules created during the model build to the test data (30% of the training data set).

Because the actual value of the target field for the test data is known, the predicted and actual values are compared to determine the effectiveness of the model.

One report and two charts are created during the evaluation. These are the:

- Lift Chart
- Performance Matrix Report
- Attribute Importance Chart

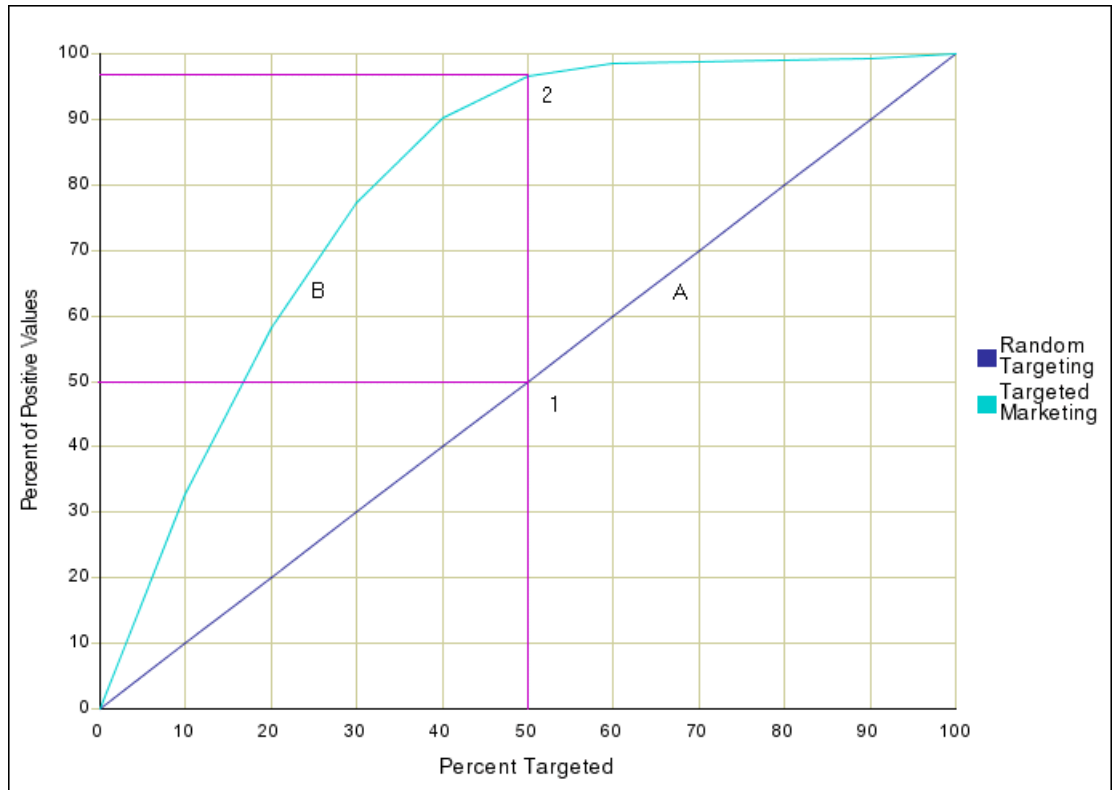
Table 4–3 Model Reports

Report or Chart	Use
Lift Chart	A graphical representation of the benefits of using the model over contacting your target population at random.
Performance Matrix Report	Provides statistical insight into the accuracy of the model build.
Attribute Importance Chart	Displays the predictive power of the customer attributes in determining the target value.

Based upon the information in these reports, you can make modifications to your data that will improve the predictive power of your model. See [Section 4.1.3, "Improving Model Results"](#).

4.1.2.1 About the Lift Chart

The Lift Chart illustrates the benefit of using the predictive model to intelligently select a portion of your target population as opposed to targeting the entire population at random. Targeting only the strong prospects allows you to reduce marketing costs and improve your return on investment.



The x axis, Percent Targeted, is the total target population. The y axis, Percent of Positive Values, is the population exhibiting the target behavior. For a Response model, this indicates the percentage of positive responders. For a Loyalty/Retention model, this indicates the percentage of customers who have not placed an order within the last three months.

The A and B lines in the graph represent the percentage of the total population (x axis) that you must target to reach the desired percentage of responders or defectors (y axis).

The curved line (B) is the lift. It indicates the advantage the model provides over targeting prospects at random. The more the line curves to the upper left hand corner of the graph, the more benefit you will achieve with the model.

Reading different points along the lines indicates what percentage of the total population you must target to meet your goal. In the Lift Chart shown above, let us

assume that our target population consists of 100,000 customers (x axis) and the total responders equal 5,000 (y axis). The intersection labeled 1 indicates that randomly contacting 50% (50,000) of your target population might yield a positive response rate of 50% (2,500). The intersection labeled 2 indicates that by using the predictive model, you can selectively target just 50% (50,000) of the population with the possibility of a 95% (4,750) response rate.

This outcome demonstrates the increase in campaign return on investment that may be achieved using predictive modeling.

4.1.2.2 About the Performance Matrix Report

The Performance Matrix report (also referred to as a Confusion Matrix) provides statistical insight into the accuracy of the model. It displays information in two formats: as record counts, and as percentages. It rates the predictions made by the model against what actually occurred within the holdout sample of the training data.

Model Details - Performance Matrix Results

Name : Platinum Card Response Model

Type : Direct Mail Response

Data Source : TCA Persons

Last Build Date/Time : 20-JAN-2003, 21:18 PM

Elapsed Build Time : 0 Days, 0 Hours, 11 Minutes

Counts

The overall Accuracy Rate for the Model is 77.60 % (total % of correct predictions).

The overall Error Rate for the Model is 22.40 % (total % of incorrect predictions).

	Responders	Non Responders	Total
Predicted Correctly	83	364	447
Predicted Incorrectly	34	95	129
Total	117	459	576

Percentages

	Responders	Non Responders
Predicted Correctly	70.94 %	79.30 %
Predicted Incorrectly	29.06 %	20.70 %

As shown in the figure above, the Counts table displays the number of correct and incorrect predictions the model made. It consists of three rows (Predicted Correctly, Predicted Incorrectly, and Total) and three columns (Responders, Non-Responders, and Total). For example, out of 117 responders, the model predicted 83 responders correctly and 34 incorrectly.

The Percentages table shows the overall accuracy rate of the model in percentage numbers. For example, the percentage of responders predicted correctly is 83/117 or 70.94%.

4.1.2.3 About the Attribute Importance Chart

The Attribute Importance chart displays the importance of the attributes in determining the target field value. It allows you to see which customer attributes have the most significant effect on the predictive capability of a model.

Attribute importance information can be displayed in two formats: as a pie chart or a columnar chart. Each slice of the pie chart is labeled with a percent; the total of the slices equals 100%. The columnar chart indicates a numerical value for each attribute on the Y-axis. In both legends, the attributes are displayed in descending order of importance.

By default, only the top 10 attributes are displayed. You have the option of displaying additional attributes by entering a value in the Number of Attributes field.

4.1.3 Improving Model Results

After evaluating the model results, you can manipulate your training data in a number of ways to improve the predictive power of your model. You can:

- [Section 4.1.3.1, "Increase the Size of the Training Data Set"](#)
- [Section 4.1.3.2, "Improve the Quality of Customer Data"](#)
- [Section 4.1.3.3, "Focus on Characteristics"](#)
- [Section 4.1.3.4, "Split the Target Population"](#)

4.1.3.1 Increase the Size of the Training Data Set

Larger sets of training data tend to produce more accurate results. While there is no minimum size, the training data set should include thousands if not tens of thousands of customers, prospects or both for the best results.

4.1.3.2 Improve the Quality of Customer Data

If your data is missing many of the attributes, the models will still work, but will not be as accurate. Consider using other application products as these will automatically fill in the required customer data. For a list of attributes used in models, see the *Oracle Marketing Implementation Guide*.

4.1.3.3 Focus on Characteristics

Choose a training data with characteristics that are as close as possible to the target population. The more similar the two populations, the better the predictive model.

4.1.3.4 Split the Target Population

Split the target population and build multiple specialized models. The more precisely you target your audience, the more precise your model will be. For example, a shoe retailer may wish to build a separate model for marketing to males

and females because the two markets behave very differently. Another approach this retailer might take would be to build a separate model for different age groups: children, adults, and seniors.

4.1.4 About Scoring a Target Population with Your Model

Scoring is the process of using a model to predict the future behavior of a specific population based on the attribute values of individual customer records. The score assigned to a customer or prospect indicates the likelihood that they will exhibit the desired behavior.

After scoring, the target population is divided into ten continuous segments called deciles. Each decile represents a certain number of customers, prospects or both. The sum of the record counts in each decile equals the total target population. The deciles are ordered from the highest to the lowest probability of displaying the target behavior. Therefore, the customer records in decile 1 are the most likely to exhibit the behavior you are interested in.

Based on this information, you can select the groups with the highest probability of exhibiting a target behavior, and generate a list. The list can then be used for marketing activities such as executing an e-mail campaign. Campaign execution closes the loop of using a predictive model to score a target population and generate a list of customers or prospects that are most likely to exhibit the target behavior.

An example of the scoring run results for a Response model is shown in [Table 4-4](#), "Scoring Run Results" below. [Table 4-5](#), "Scoring Run Report", provides a description of each column in the scoring run results table.

Table 4-4 Scoring Run Results

Decile	Propensity to Respond*	Number of Records	Percent of Positive Values	Include in List
1	90-100%	1560	26.54	x
2	80-89.99%	183	3.11	x
3	70-79.99%	87	1.48	x
4	60-69.99%	48	.82	x
5	50-59.99%	45	.77	
* Propensity to Respond is displayed for Response model types. For Loyalty/Retention models, this column is labeled Propensity to Defect; for Custom models it is labeled Propensity for Positive Target Values.				

Table 4–4 Scoring Run Results

Decile	Propensity to Respond*	Number of Records	Percent of Positive Values	Include in List
6	40-49.99%	78	1.33	
7	30-39.99%	231	3.93	
8	20-29.99%	183	3.11	
9	10-19.99%	261	4.44	
10	0-9.99%	3,201	54.47	
* Propensity to Respond is displayed for Response model types. For Loyalty /Retention models, this column is labeled Propensity to Defect; for Custom models it is labeled Propensity for Positive Target Values.				

The following table describes each of the columns on a scoring run report.

Table 4–5 Scoring Run Report

Column	Description
Decile	Each number represents a group of customers, prospects or both. The deciles are ordered by the probability of response, from the highest to the lowest. The first decile represents group members with a 90-100% likelihood of exhibiting the target behavior; the second decile includes those who are 80-89.99% likely to respond to your campaign; and so on.
Propensity to Respond (Response models) Propensity to Defect (Loyalty /Retention models) Propensity for Positive Target Values (Custom models)	The probability that persons or organization contacts (customer records) in the decile will exhibit the target behavior. Select the deciles with the highest predicted probabilities for your list. For a Loyalty /Retention model, the percentages represent how likely the members of each decile are to defect to a competitor.
Number of Records	The number of records in the decile.
Percent of Positive Values	A percentage representation of the number of records in the decile to the total number of records.
Include in List	This column contains a check box for each decile. The check boxes allow you to select the customer records in a particular decile and include them in a list.

4.1.5 Generating a List

When viewing the results of a scoring run, you will notice a column called Include In List. The check boxes in this column allow you to narrow your target population by selecting only the segments (deciles) with the highest probability of exhibiting the target behavior. Typically you will want to select the groups with the highest probability of exhibiting a target behavior.

Once you have generated a list, you can access it by navigating to Audience > List. To view the actual names on the list and other related details, click the Entries link.

For more information about lists, see [Section 2.1.1, "Understanding Lists"](#) and [Section 2.2.5.3, "Creating a Target Group for a Campaign Schedule"](#).

4.2 Data Mining User Procedures

The following procedures will take you through the data mining process so that you can ultimately identify and select the customer records with the highest probability of exhibiting your target behavior. The top-level procedures are as follows:

- [Section 4.2.1, "Building a Model"](#)
- [Section 4.2.2, "Viewing and Modifying a Model"](#)
- [Section 4.2.3, "Evaluating Model Build Results"](#)
- [Section 4.2.4, "Copying a Model"](#)
- [Section 4.2.5, "Scoring a Target Population"](#)
- [Section 4.2.6, "Modifying a Scoring Run"](#)
- [Section 4.2.7, "Viewing Scoring Run Results"](#)
- [Section 4.2.8, "Generating Lists from Scoring Run Results"](#)
- [Section 4.2.9, "Copying a Scoring Run"](#)
- [Section 4.2.10, "Creating Personalized Searches"](#)
- [Section 4.2.11, "Viewing Logs"](#)

4.2.1 Building a Model

This section provides step-by-step instructions on model building. For an overview of models and the model building process, see [Section 4.1.1, "Understanding Model Building"](#).

Follow the procedures listed in the sections below to build a model.

4.2.1.1 Creating the Model

To create a model, follow the steps below.

Prerequisites

None.

Steps

1. Navigate to Analytics. The Models page appears.
2. Click Create. The Model Create page appears.
3. Complete the fields as follows:
 - a. In the Name field, enter a unique name for your model.
 - b. In the Type field, open the list and select a model type. The page refreshes with the corresponding targets for the model type.
 - c. Optional. In the Expiration Date field, click the calendar icon and select an expiration date for the model.

Entering an expiration date limits the availability of your model to this date. On the expiration date, the model status is changed to archived and it is no longer available for use.

- d. Optional. In the Owner field, change the name displayed as follows:

- Delete the name in the field.

The default owner is the individual who logged in to the application. If you do not delete the default name first, you will not see the other names available when you open the Resource Selector.

- Click the search icon. The Resource Selector window appears.
- Locate and click a name.

To filter the list, enter the first or more letters of a name and click Go.

- e. In the Target field, open the list and select a target.

The data source is implicitly defined when you select the target.

- f. Optional. In the Description field, enter a description for your model.

4. Click Create. The Model Details page appears.

Next you will select the training data for your model. The training data can reside in the Oracle TCA or a user-defined data source. Proceed to one of the following:

- [Section 4.2.1.2, "Selecting Training Data For Response Models Using Seeded Data Sources"](#)
- [Section 4.2.1.3, "Selecting Training Data for Loyalty/Retention Models Using Seeded Data Sources"](#)
- [Section 4.2.1.4, "Selecting the Training Data Custom Models Using Seeded or User-Defined Data Sources"](#)

4.2.1.2 Selecting Training Data For Response Models Using Seeded Data Sources

Follow this procedure to select the training data for response models that will use an Oracle Marketing seeded data source. Your data source is seeded if it is listed as TCA Persons or TCA Organization Contacts.

Prerequisites

- The basic information for the model must be set up. See [Section 4.2.1.1, "Creating the Model"](#).
- You must know the name of the campaign and the campaign schedule that contains the historical data that will be used to train your model.
- The population targeted by the historical campaign must have trackable similarities to the population you will target with your new campaign.
- The campaign must include both responders and non-responders.

Steps

1. Navigate to Analytics.
2. Click the model name, then click Training Data.
The Model Training Data page appears.
3. Select a campaign as follows:

- a. In the Campaign Name column, click the search icon. The Campaign Selector window appears.

To filter the list, enter one or more letters of the campaign name, then click the search icon. Only campaigns with the status Active are shown.
 - b. If necessary, change the country by opening the Country list and choosing a county.
 - c. Locate and click the campaign name.
 - To filter the list, enter one or more letters of the campaign name in the Search Keyword field, then click Search.
 - Only one campaign can be selected.
 - To change your selection, you must first delete the current campaign name.
4. Select a campaign schedule as follows:
 - a. Click the Campaign Schedule search icon. The Campaign Schedule Selector window appears.
 - To filter the list, enter one or more letters of the campaign schedule name in the Search Keyword field, then click Search. Only campaign schedules with the status Active are shown.
 - Only one campaign schedule can be selected; the status must be Active.
 - b. Locate and click the campaign schedule name.
 - To filter the list, enter one or more letters of the campaign schedule name in the Campaign Schedule field, then click Go.
 - Only one campaign schedule can be selected; the status must be Active.
 - To change your selection, you must first delete the current campaign schedule.
5. Optional. To restrict the size of the training data, make selections under Selection Method and Record Count as follows:
 - a. To select training data records in non-random order, click the Top Down button.
 - b. To select every Nth row, click Every and enter the number of rows. For example, if you enter a 5, the application will look at every 5th record in the table.

- c. To select a percentage of the records at random, click Random and enter a value for the percent of records. This operation uses the inherent database function of random which has its own algorithm.
- d. To ensure that a minimum number of records is used, enter a value in Minimum field.
- e. To limit the number of records used for training, enter a value in the Maximum field.

For example, to select records starting from the top down until some maximum number is reached, select Top Down and enter a value in the Maximum field.

Note: The system applies the Selection Method criteria before the Record Count criteria. If a conflict occurs, the Record Count criteria takes precedences.

6. To preview your selections, click Preview.

Note: To complete the preview process, the Workflow Background Process must be running. See your System Administrator or refer to the *Oracle Marketing Implementation Guide* for more information on the Workflow Background Process.

During the preview, the model status is changed to Previewing and the application displays information about the training data including the record count, number of positive responses, and the percent of positive responses. When the preview is complete, the model status is changed to Draft.

You can also:

- Click Cancel to cancel the preview. The model status returns to Draft.
 - Click the Monitor the Workflow Process hyperlink to monitor the status of the Workflow Background Process.
7. When the preview is finished, do one of the following:
- To save your changes, click Update.
 - To discard your changes, click Restore.

Once you are satisfied with the training data, you are ready to schedule a build. Proceed to [Section 4.2.1.5, "Scheduling a Build for a Model"](#).

4.2.1.3 Selecting Training Data for Loyalty/Retention Models Using Seeded Data Sources

Follow this procedure to select the training data for loyalty/retention models that will use an Oracle Marketing seeded data source. Your data source is seeded if it is listed as TCA Persons or TCA Organization Contacts.

Prerequisites

- The basic information for the loyalty/response model must be set up. See [Section 4.2.1.1, "Creating the Model"](#).
- The source for the training data must already exist.
- The training data must:
 - Include customers who have and who have not placed an order within the last three months.
 - Be as similar as possible to your target population.
 - Include demographic, transaction history, and account status information.

Steps

1. Navigate to Analytics.
2. Click the model name, then click Training Data.

The Model Training Data page appears. Oracle Marketing provides three source types: Discoverer Workbook, Generated List and Segment.
3. To train your model from a single source, proceed to step a. To use multiple sources, proceed to the step 3.
 - a. In the first row of the Order column, enter a 1.
 - b. In the Operation column, accept the default of Include.
 - c. In the Type column, open the list and select a source type.
 - d. In the Name column, click the search icon. A selector window appears.

To filter the list, enter one or more letters of the source name, then click the search icon.

- e. If necessary, change the country by opening the Country list and choosing a country.
 - f. Locate and click the data source name.
 - To filter the list, enter one or more letters of the source name in the Workbook, List or Segment name field, then click Go.
 - To change your selection, you must first clear the name field.
4. To train your model from multiple sources:
- a. In the first row, enter a 1 in the Order column and accept the default of Include in the Operation column.

Note: When using multiple training data sources, the Order and Operation for the first row must be set to 1 and Include respectively.

- b. In the Type column, open the list and select a source type.
- c. In the Name column, click the search icon. A selector window appears.

To filter the list, enter one or more letters of the source name, then click the search icon.
- d. If necessary, change the country by opening the Country list and choosing a country.
- e. Locate and click the data source name.
 - To filter the list, enter one or more letters of the source name in the Workbook, List or Segment name field, then click Go.
 - To change your selection, you must first clear the name field.
- f. To specify the remaining data sources:
 - In the Order column, enter a value.
 - Open the Operation list and select Include, Exclude or Intersect.

Include: Include all of the customer records in this source.

Exclude: Exclude all of the customer records in this source from the previous sources.

Intersect: Use only the customer records common to this source and the previous sources.

Note: The application looks at each list and performs the include, exclude, and intersect operations in the order specified. For example, you specify three sources numbered 1, 2 and 3, with no size restrictions.

1. The application includes all of the records in source 1 in the training data set. We will call this the current training data.
 2. It then compares the current training data with source 2. If the operation is exclude, the data is modified to consist of the records unique to source 1 only. This set of records is now the current training data.
 3. Finally, the application compares the current training data with source 3. If the operation is intersect, it modifies the data to consist of only the records that are common to both sets (in other words, the results from step 2 and source 3.)
-

5. Optional. To restrict the size of the training data, make selections under Selection Method and Record Count as follows:
 - a. To select training data records in non-random order, click the Top Down button.
 - b. To select every Nth row, click Every and enter the number of rows. For example, if you enter a 5, the application will look at every 5th record in the table.
 - c. To select a percentage of the records at random, click Random and enter a value for the percent of records. This operation uses the inherent database function of random which has its own algorithm.
 - d. To ensure that a minimum number of records is used, enter a value in Minimum field.
 - e. To limit the number of records used for training, enter a value in the Maximum field.

For example, to select records starting from the top down until some maximum number is reached, select Top Down and enter a value in the Maximum field.

Note: The system applies the Selection Method criteria before the Record Count criteria. If a conflict occurs, the Record Count criteria takes precedence.

6. To preview your selections, click Preview.

Note: To complete the preview process, the Workflow Background Process must be running. See your System Administrator or refer to the *Oracle Marketing Implementation Guide* for more information on the Workflow Background Process.

During the preview, the model status is changed to Previewing and the application displays information about the training data including the record count, number of positive responses, and the percent of positive responses. When the preview is complete, the model status is changed to Draft.

You can also:

- Click Cancel to cancel the preview. The model status returns to Draft.
- Click the Monitor the Workflow Process hyperlink to monitor the status of the Workflow Background Process.

7. When the Preview is finished, do one of the following:

- To save your changes, click Update.
- To discard your changes, click Restore.

Once you are satisfied with the training data, you are ready to schedule a build. Proceed to [Section 4.2.1.5, "Scheduling a Build for a Model"](#).

4.2.1.4 Selecting the Training Data Custom Models Using Seeded or User-Defined Data Sources

To select training data for a custom model from the Oracle customer model (TCA) or a user-defined data source, follow the steps below.

Prerequisites

- The basic information for the custom model must be set up. See [Section 4.2.1.1, "Creating the Model"](#).

- The source for the training data must already exist.
- The training data must be as similar as possible to your target population.

Steps

1. Navigate to Analytics.
2. Click the model name, then click Training Data.

The Model Training Data page appears.

To filter the training data, you can use a combination of attributes and Discoverer Workbooks.

3. To specify attributes:
 - a. Click the search icon in the Attribute Name column. The Field Selector window appears.

To filter the list, enter one or more letters of the attribute name in the Attribute Name field, then click the search icon. You can do the same thing using the Field Name and Search button in the Field Selector window.
 - b. To select the attribute, click the Source Field Meaning.
 - c. Open the Condition list and select a condition.
 - d. In the Value field, enter a value.
4. To specify a Discoverer Workbook, click the search icon next to the Workbook Name field.

To filter the list, enter one or more letters of the workbook name, then click the search icon.
5. Click the workbook name, then select a workbook and worksheet.
6. Optional. To restrict the size of the training data, make selections under Selection Method and Record Count as follows:
 - a. To select training data records in non-random order, click the Top Down button.
 - b. To select every Nth row, click Every and enter the number of rows. For example, if you enter a 5, the application will look at every 5th record in the table.

- c. To select a percentage of the records at random, click Random and enter a value for the percent of records. This operation uses the inherent database function of random which has its own algorithm.
- d. To ensure that a minimum number of records is used, enter a value in Minimum field.
- e. To limit the number of records used for training, enter a value in the Maximum field.

For example, to select records starting from the top down until some maximum number is reached, select Top Down and enter a value in the Maximum field.

Note: The system applies the Selection Method criteria before the Record Count criteria. If a conflict occurs, the Record Count criteria takes precedence

- 7. To preview your selections, click Preview.

Note: To complete the preview process, the Workflow Background Process must be running. See your System Administrator or refer to the *Oracle Marketing Implementation Guide* for more information on the Workflow Background Process.

During the preview, the model status is changed to Previewing and the application displays information about the training data including the record count, number of positive responses, and the percent of positive responses. When the preview is complete, the model status is changed to Draft.

You can also:

- Click Cancel to cancel the preview. The model status returns to Draft.
- Click the Monitor the Workflow Process hyperlink to monitor the status of the Workflow Background Process.

- 8. When the Preview is finished, do one of the following:
 - To save your changes, click Update.
 - To discard your changes, click Restore.

Once you are satisfied with the training data, you are ready to schedule a build. Proceed to [Section 4.2.1.5, "Scheduling a Build for a Model"](#).

4.2.1.5 Scheduling a Build for a Model

To schedule a build for your model, follow the steps below.

Prerequisites

For all model types, the training data set must be specified, including any restrictions on the training data size.

Steps

1. Navigate to Analytics > Build.

The Schedule Model Build page appears.

2. Click Generate immediately or Generate at a future time.

Note: Model building may impact system performance. Therefore, consider scheduling builds for off-peak hours.

3. If you clicked Generate at a future time:
 - a. In the Date field, click the calendar icon to open the calendar. Locate and click the date.
 - b. Enter a time by opening the three lists (hour, minutes and AM or PM) and selecting the appropriate values.
 - c. Open the Time Zone list and select a time zone.
4. Click Update to execute the build or Restore to discard your changes.

Note: To cancel a build, navigate to Analytics > *Model Name* > Build, and click Cancel Build.

You can check the status field to ascertain when the model building is complete. A status of Available indicates that the build was successful. You are now ready to view the reports generated during the model build. Proceed to [Section 4.2.3, "Evaluating Model Build Results"](#).

4.2.2 Viewing and Modifying a Model

To view and modify models, follow the steps below.

Prerequisites

At least one model must exist.

Steps

1. Navigate to Analytics.

The Models page appears.

2. Locate and click the model name using one of these methods. The Model Details page appears.
 - Scroll through the list and click the model name.
 - In the Quick Find field, select Model. Then enter one or more letters of the model name in the empty field and click Go.
 - Open the Saved Searches list, select a search, then click Search.

You can now view or modify information about the model.

Note: To create or modify searches, click the Personalize button. For more information, see [Section 4.2.10, "Creating Personalized Searches"](#).

3. If you are modifying a model, make your changes now.

The following table describes the fields that you can modify.

Table 4–6 *Model Details*

Field	Description
Name	The model name. Enter a unique name for the model.
Status	Indicates the current status of the model. For more information on model statuses, see Section 4.2.2.1, "About Model Statuses" .
Expiration Date	The model is unavailable for use after this date. If the model has already expired, then removing the date entry or entering a future date allows you to make the model available again.

Table 4–6 Model Details

Field	Description
Owner	The current owner of the model. Click Go in the Owner field to change the owner.
Description	Enter relevant description of the model.
Type	The type of model. Cannot be modified.
Data Source	A flexible set of customer attributes that are compared by the data mining engine. Cannot be modified.
Target	A column in the database that represents the customer behavior you are trying to predict. Cannot be modified.

4. Click Update to save your changes, or click Restore to discard them.

4.2.2.1 About Model Statuses

The status of a model indicates its state. The current status of a model determines whether or not you can use it for a build or a scoring run, modify it, copy it, or change its status.

The table below provides a description of each status, what the status can be reset to, what fields you can modify, and whether or not you can copy the model.

Table 4–7 Model Status

Status	Meaning	Can be reset to	What you can modify	What you can copy
Draft	All new models have this status initially.	Archived (manually)	All fields.	Create an identical model with a different name and status of Draft.
Scheduled	Model is scheduled to be built.	Draft by cancelling the build.	All fields.	Create an identical model with a different name and status of Draft.
Building	The application is in the process of building the model.	Draft by cancelling the build.	Training data is locked.	Create an identical model with a different name and status of Draft.

Table 4–7 Model Status

Status	Meaning	Can be reset to	What you can modify	What you can copy
Failed	An error occurred while building or previewing the model.	Archived (manually)	View the model log, make the necessary changes. Preview or rebuild the model.	Create an identical model with a different name and status of Draft.
Invalid	The model was successfully built (status was Available), but cannot be used for scoring because changes were made to the training data. See Invalid below for more information.	Archived (manually)	Rebuild the model.	Create an identical model with a different name and status of Draft.
Previewing	The training data has been submitted for previewing. If successful, the status is changed to Draft. If the preview fails, the status is changed to Failed. A request to build the model during this state terminates the preview.	Cannot be reset.	All fields.	Create an identical model with a different name and status of Draft.
Scoring	A scoring run is taking place.	Available by cancelling the scoring run.	Target population data is locked.	Create an identical model with a different name and status of Draft.

Table 4–7 Model Status

Status	Meaning	Can be reset to	What you can modify	What you can copy
Available	Model is built and available for a scoring run. When rebuilding a model, the results of the previous build are purged.	Archived (manually)	All fields.	Create an identical model with a different name and status of Draft.
Expired	The model expires at the end of the date you enter in the Expiration Date field.	Cannot be reset.	Cannot be modified.	Create an identical model with a different name and status of Draft.
Archived	Archived models only appear in the All Models list. The application automatically deletes the source data for the model.	Cannot be reset.	Cannot be modified.	Create an identical model with a different name and status of Draft.

Invalid

As stated in the table above, a status of Invalid means that the model was successfully built, but that some change has occurred after the build that has caused the status to change. The changes that can result in a status of Invalid are:

- A column in the data source is disabled or enabled for data mining.
- The training data selections are changed. For example:
 - Campaign schedule selections are changed for a Response model
 - Workbooks, lists or segment selections are changed for a Loyalty/Retention model
 - Attributes or workbook filters for training data sources are changed
 - Selection methods or record counts are changed

When the status of a model is Invalid, it cannot be used for a scoring run. You can rebuild the model. If the build is successful, the status will change to Available and you can use it for a scoring run.

4.2.2.2 Working with Attachments

To view, delete or add attachments to a model, follow the steps below.

Steps

1. Navigate to Analytics.
2. Do one of the following:
 - Click the model name, then click Attachments.
 - Navigate to Scoring Runs, click a scoring run name, then click Attachments.The Model or Scoring Run Details - Attachments page appears.
3. To view an attachment, click the attachment name.
4. To create an attachment:
 - a. Click Create. The Create Attachment page appears.
 - b. In the Description field, enter a description for the attachment.
 - c. To attach a file, click the Search icon next to the File field. Locate and select the file, then click Submit.
 - d. Enter text in the Text field.
 - e. Enter a URL in the URL field.
 - f. Click Create to add the attachment or Clear to clear the fields.
5. To delete an attachment, select the Remove box and click Update.

4.2.2.3 Working with Notes

For more information about notes,

1. In a browser window, enter this URL: <http://www.oracle.com>
2. Under Services, navigate to Support > Oracle MetaLink.
3. Log on to MetaLink.
4. Navigate to Top Tech Docs > CRM Foundation JTT > Documentation > Foundation.
5. Open the document titled, Oracle CRM Application Foundation Concepts and Procedures Guide, release 11.5.6.
6. Navigate to Notes.

4.2.2.4 Setting Up Tasks

For more information about tasks,

1. In a browser window, enter this URL: <http://www.oracle.com>
2. Under Services, navigate to Support > Oracle MetaLink.
3. Log on to MetaLink.
4. Navigate to Top Tech Docs > CRM Foundation JTT > Documentation > Foundation.
5. Open the document titled, Oracle CRM Application Foundation Concepts and Procedures Guide, release 11.5.6.
6. Navigate to Task Manager.

4.2.2.5 Working with Teams

Teams can consist of individuals and groups. Team members can belong to your organization, or they can be external to your organization such as partners.

By default, the creator of the model or scoring run has read and write privileges. When you add other teams members to the model or scoring run, you provide them with read and write access as well. Only team members can update information for their models and scoring runs.

For more information about teams,

1. In a browser window, enter this URL: <http://www.oracle.com>
2. Under Services, navigate to Support > Oracle MetaLink.
3. Log on to MetaLink.
4. Navigate to Top Tech Docs > CRM Foundation JTT > Documentation > Foundation.
5. Open the document titled, Oracle CRM Application Foundation Concepts and Procedures Guide, release 11.5.6.
6. Navigate to Resource Manager > Understanding Resource Manager > Understanding Teams.

4.2.3 Evaluating Model Build Results

To view the reports generated automatically when a model is built, follow the steps below. The reports enable you to evaluate the accuracy and the benefits of using the model.

Prerequisites

The model must be built before you can evaluate it.

Steps

1. Navigate to Analytics. The Models page appears.
2. Locate and click the model name using one of these methods:
 - Scroll through the list and click the model name.
 - In the Quick Find field, select Model. Then enter one or more letters of the model name in the empty field and click Go.
 - Open the Saved Searches list, select a search, then click Search.
3. Click the model name. The Model Details page appears.
4. Click the Results link. The Lift Chart appears.
5. Click the appropriate link to examine each report.

A summary of each report is listed below.

6. If you are not satisfied with the results of the build, you can make modifications that may improve the model. For more information, see [Section 4.1.3, "Improving Model Results"](#).

Lift Chart: Illustrates the benefit of using the predictive model as opposed to targeting a population at random. For more information, see [Section 4.1.2.1, "About the Lift Chart"](#).

Performance Matrix: Provides statistical insight about the accuracy of the model as record counts and percentages. For more information, see [Section 4.1.2.2, "About the Performance Matrix Report"](#)

Attribute Importance: Displays the importance for all of the attributes within a training data set in two formats: as columns or as a pie chart. By default, only the top 10 attributes are displayed. To change the number displayed, enter a new value in the Number of Attributes field. For more information, see [Section 4.1.2.3, "About the Attribute Importance Chart"](#).

4.2.4 Copying a Model

All models can be copied. The status of the new models is Draft. To copy a model, follow the steps below.

Prerequisites

A model with any status except for Archived must be available.

Steps

1. Navigate to Analytics. The Models page appears.
2. Locate and click the model name using one of these methods. The Model Details page appears.
 - Scroll through the list and click the model name.
 - In the Quick Find field, select Model. Then enter one or more letters of the model name in the empty field and click Go.
 - Open the Saved Searches list, select a search, then click Search.
3. Do one of the following:
 - Click Copy to open the Copy Model page and select a model from a list.
 - Click the name of a model to open the Model Details page.
4. If you opened the Copy Model page:
 - a. Click the search icon to open a list of models. The Models Lookup window appears.

To filter the list, enter one or more letters of the model name in the Source Model Name field, then click the search icon.
 - b. Optional: To filter the list in the Models Lookup window, enter one or more letters in the Model Name field, then click Go.
 - c. Click the model name.
5. If you opened the Model Details page for a specific model, click Copy.
6. In the New Model Name field, enter a name for the new model.
7. To assign a new owner:
 - a. Clear the Owner field, then click the search icon.
 - b. Open the User/Role list and select Employee or Partner.

- c. Click Go.

To filter the list, enter one or more letters for the employee or partner name, then click Go.

8. Indicate any additional components (Training Data and Team) you want to copy by selecting the Copy check boxes.
9. Click Copy to display the Model Details page for the new model, or click Restore to discard your current settings.

4.2.5 Scoring a Target Population

Scoring is the process of using a predictive model to determine how likely are the members of a target population are to exhibit the target behavior. To score a population, follow these procedures:

- [Section 4.2.5.1, "Creating a Scoring Run"](#)
- [Section 4.2.5.2, "Selecting a Target Population When Using a Seeded Data Source"](#) or [Section 4.2.5.3, "Selecting a Target Population When Using a User-Defined Data Source"](#)
- [Section 4.2.5.4, "Scheduling a Scoring Run"](#)

The scoring process looks at the data mining attribute values for each member (customer record) of the target population. It then scores each record based on how likely that member is to exhibit the target behavior. The application then divides the population into 10 groups called deciles based on the score given to the record.

When scoring is complete, you can generate a list by selecting the deciles (customer records) with a high likelihood of exhibiting the target behavior. The list would then be targeted in a future marketing campaign.

To score a population, follow the steps below.

Prerequisites

A model that has been built and has a status of Available.

4.2.5.1 Creating a Scoring Run

Steps

1. Navigate to Analytics > Scoring Runs.

The Scoring Runs page appears.

2. Click Create.
3. In the Name field, enter a name for the scoring run.
4. In the Model field, click the search icon.

To filter the list, enter one or more letters for the model name, then click the search icon.
5. Optional. In the Owner field, change the name displayed as follows:
 - a. Delete the name in the field.

The default owner is the individual who logged in to the application. If you do not delete the default name first, you will not see the other names available when you open the Resource Selector.
 - b. Click the search icon. The Resource Selector window appears.
 - c. Locate and click a name.

To filter the list, enter the first or more letters of a name and click Go.
6. Optional. In the Description field, enter a description for the scoring run.
7. Click Create to save the run, or Clear to clear the fields.

If you clicked Create, you are ready to select your target population. Proceed to one of the following procedures:

- [Section 4.2.5.2, "Selecting a Target Population When Using a Seeded Data Source"](#).
- [Section 4.2.5.3, "Selecting a Target Population When Using a User-Defined Data Source"](#).

4.2.5.2 Selecting a Target Population When Using a Seeded Data Source

To select the target population for models built using an Oracle Marketing seeded data source, follow the steps below. Your data source is seeded if it is listed as TCA Persons or TCA Organization Contacts.

For scoring a population selected from a user-defined, see [Section 4.2.5.3, "Selecting a Target Population When Using a User-Defined Data Source"](#).

Prerequisites

The basic information for a scoring run must be set up before you can execute it.

Steps

1. Navigate to Analytics > Scoring Runs. The Scoring Runs page appears.
2. Click the scoring run name. A side navigation bar appears.
3. Click the Selections link. The Scoring Run Details - Selection page appears.
4. To score a single population, proceed to step a. To score multiple populations, proceed to step 3.
 - a. In the Order column, enter a 1.
 - b. In the Operation column, accept the default of Include in the Operation column.
 - c. In the Type column, open the list and select the population source.

Oracle Marketing provides three source types: Discoverer Workbook, Generated List and Segment.
 - d. In the Name column, click the search icon. A Selector window appears.

To filter the list, enter one or more letters in Name field, then click the search icon.
 - e. Select the workbook, segment or generated list by clicking the name.
5. To score multiple populations:
 - a. In the first row, enter a 1 in the Order column, and accept the default of Include in the Operation column.

Note: When selecting multiple populations, the Order and Operation for the first row must be set to 1 and Include respectively.

- b. In the Type column, open the list and select a source type.

Oracle Marketing provides three source types: Discoverer Workbook, Generated List and Segment.
- c. In the Name column, click the search icon. A Selector window appears.

To filter the list, enter one or more letters in Name field, then click the search icon.
- d. Select the workbook, segment or generated list by clicking the name.

- e. To specify the remaining target population sources:
 - In the Order column, enter a value.
 - Open the Operation list and select one of the following:
 - In the Order column, enter a value.
 - Open the Operation list and select Include, Exclude or Intersect.
 - Include: Include all of the customer records in this source.
 - Exclude: Exclude all of the customer records in this source from the previous sources.
 - Intersect: Use only the customer records common to this source and the previous sources.

Note: The application looks at each list and performs the include, exclude, and intersect operations in the order specified. For example, you specify three sources numbered 1, 2 and 3, with no size restrictions.

1. The application includes all of the records in source 1 in the target population set. We will call this the current target population.
 2. It then compares the current target population with source 2. If the operation is exclude, the data is modified to consist of the records unique to source 1 only. This set of records is now the current target population.
 3. Finally, the application compares the current target population with source 3. If the operation is intersect, it modifies the data to consist of only the records that are common to both sets (in other words, the results from step 2 and source 3.)
-

6. Optional. To restrict the size of the target population, make selections under Selection Method and Record Count as follows:
 - a. To select target population records in non-random order, click the Top Down button.
 - b. To select every Nth row, click Every and enter the number of rows. For example, if you enter a 5, the application will look at every 5th record in the table.

- c. To select a percentage of the records at random, click Random and enter a value for the percent of records. This operation uses the inherent database function of random which has its own algorithm.
- d. To ensure that a minimum number of records is used, enter a value in Minimum field.
- e. To limit the number of records used for training, enter a value in the Maximum field.

For example, to select records starting from the top down until some maximum number is reached, select Top Down and enter a value in the Maximum field.

Note: The system applies the Selection Method criteria before the Record Count criteria. If a conflict occurs, the Record Count criteria takes precedence.

7. To preview the record count, click Preview.

Note: To complete the preview process, the Workflow Background Process must be running. See your System Administrator or refer to the *Oracle Marketing Implementation Guide* for more information on the Workflow Background Process.

During the preview, the scoring run status is changed to Previewing. When the preview is complete, the scoring run status is changed to Draft.

You can also:

- Click Cancel to cancel the preview. The scoring run status returns to Draft.
- Click the Monitor the Workflow Process hyperlink to monitor the status of the Workflow Background Process.

8. When the Preview is finished, do one of the following:

- To save your changes, click Update.
- To discard your changes, click Restore.

Once you are satisfied with your target population, you are ready to schedule a scoring run. Proceed to [Section 4.2.5.4, "Scheduling a Scoring Run"](#).

4.2.5.3 Selecting a Target Population When Using a User-Defined Data Source

Oracle Marketing provides two seeded data sources: TCA Persons and TCA Organization Contacts. If either of these is your data source, see [Section 4.2.5.2, "Selecting a Target Population When Using a Seeded Data Source"](#).

For a user-defined data source, you can use a combination of attributes and Discoverer Workbook filters to restrict the size of your target population. If no filters are specified, the scoring run will select and score all of the records in the data source.

To select a target population from a user-defined data source, follow the steps below.

Prerequisites

A scoring run must be created.

Steps

1. Navigate to Analytics > Scoring Runs. The Scoring Runs page appears.
2. Click the scoring run name. A side navigation bar appears.
3. Click the Selections link. The Scoring Run Details - Selection page appears.
4. To specify attributes:
 - a. Click the search icon in the Attribute Name column. The Field Selector window appears.

If you know the attribute name, you can type the first letter in the field, then click the search icon.
 - b. Click the appropriate Source Field Meaning to select the attribute.
 - c. Open the Condition list and select a condition.
 - d. In the Value field, enter a value.
5. To specify a Discoverer Workbook, click the search icon next to the Workbook Name field.

To filter the list, enter one or more letters of the workbook name, then click the search icon.
6. Click the workbook name, then select a workbook and worksheet.
7. Optional. To further restrict the size of the target population, make selections under Selection Method and Record Count as follows:

- a. To score records in non-random order, click the Top Down button.
 - b. To select every Nth record, click Every and enter a value in the Rows field. For example, entering a 5 results in the application selecting every 5th record of the target population.
 - c. To select a percentage of the target population at random, click Random and enter a value for the % of Records field. This operation uses the inherent database function of random which has its own algorithm.
 - d. To ensure that a minimum number of records is scored, enter a value in Minimum field.
 - e. To limit the number of records scored, enter a value in the Maximum field.
- For example, to select a target population in top down order until some maximum number is reached, select Top Down and enter a value in the Maximum field.

Note: The system applies the Selection Method criteria before the Record Count criteria. If a conflict occurs, the Record Count criteria takes precedence.

8. To preview the record count, click Preview.

Note: To complete the preview process, the Workflow Background Process must be running. See your System Administrator or refer to the *Oracle Marketing Implementation Guide* for more information on the Workflow Background Process.

During the preview, the scoring run status is changed to Previewing. When the preview is complete, the scoring run status is changed to Draft.

You can also:

- Click Cancel to cancel the preview. The scoring run status returns to Draft.
- Click the Monitor the Workflow Process hyperlink to monitor the status of the Workflow Background Process.

9. When the preview is finished, d
10. Do one of the following:

- To save your changes, click Update.
- To discard them, click Restore.

Once you are satisfied with the target population, you are ready to schedule a scoring run. Proceed to [Section 4.2.5.4, "Scheduling a Scoring Run"](#).

4.2.5.4 Scheduling a Scoring Run

To schedule a scoring run, follow the steps below.

Prerequisites

You must select a target population.

Steps

1. Navigate to Analytics > Scoring Runs. The Scoring Runs page appears.
2. Click the scoring run name. A side navigation bar appears.
3. Click the Score link. The Schedule Scoring Run page appears.
4. Click Generate immediately or Generate at a future time.

Note: Scoring a large number of records may impact system performance. Therefore, consider scheduling scoring runs for off-peak hours.

5. If you clicked Generate at a future time:
 - a. In the Date field, click the calendar icon to open the calendar and select a date.
 - b. Enter a time by opening the three lists and selecting the appropriate values for hours, minutes, and AM or PM.
 - c. Open the Time Zone list and select a time zone.
6. Click Update to execute the scoring run or Restore to discard your changes.

Note: To cancel a scoring run, navigate to Analytics > Scoring Runs > *Scoring Run Name* > Score, then click Cancel Scoring Run.

To view the Workflow Background Process during a scoring run, click the Monitor the Workflow Process hyperlink.

If you scheduled the scoring run for a future time, the status is changed to Scheduled. A status of Completed indicates that the scoring run is finished and was successful. For more information on scoring run statuses, see [Section 4.2.7.1, "About Scoring Run Statuses"](#).

Once a scoring run has successfully completed, you are ready to view the run results. Proceed to [Section 4.2.7, "Viewing Scoring Run Results"](#).

4.2.6 Modifying a Scoring Run

To edit the basic information for a scoring run, follow the steps below.

Prerequisites

A scoring run must exist.

Steps

1. Navigate to Analytics > Scoring Runs.
2. Locate the scoring run using one of these methods:
 - Scroll through the list.
 - In the Quick Find field, select Scoring Runs. Then enter one or more letters of the scoring run name in the empty field and click Go.
 - Open the Saved Searches list, select a search, then click Search.
3. Click the scoring run name. The Scoring Run - Details/Create page appears.
4. Enter your changes.

You can modify the name, status, owner, and description fields.
5. Click Update to save your changes, or click Restore to discard your changes.

4.2.7 Viewing Scoring Run Results

To view the results of a scoring run, follow the steps below.

Prerequisites

The scoring run status must be Completed.

For more information on scoring run statuses, see [Section 4.2.7.1, "About Scoring Run Statuses"](#).

Steps

1. Navigate to Analytics > Scoring Runs.
2. Locate the scoring run using one of these methods:
 - Scroll through the list.
 - In the Quick Find field, select Scoring Run. Then enter one or more letters of the scoring run name in the empty field and click Go.
 - Open the Saved Searches list, select a search, then click Search.
3. Click the scoring run name. A side navigation bar appears.
4. Click the Results link. The Scoring Run Details - Results page appears.

In the Deciles section of the page, you will see that the application has sorted your target population into a continuous range of ten segments called deciles. Each decile represents a portion of the target population and indicates the likelihood that they will exhibit the target behavior.

Table 4–8 Scoring Run Results

Column Name	Description
Decile	The decile number. Decile numbers can be 1 through 10 and are listed in descending order of likelihood to exhibit the target behavior.
Propensity for Positive Target Values	Indicates the likelihood that the members of this decile will exhibit the target behavior. Propensities are displayed as a percentage range. For example, 90 to 100% implies that customer records in this decile have a 90 to 100% likelihood of exhibiting the target behavior.
Number of Records	The number of customer records that within the associated propensity range.

Table 4–8 Scoring Run Results

Column Name	Description
Percent of Positive Values	The number of records in this propensity range as a percentage of the total records in the target population.
Include in List	Allows you to select the records in a specific decile and generate a list that can be used to target this population as part of a marketing campaign.

If you are satisfied with your scoring run results, you can select which customer records you would like to include in a list that will be targeted by a future marketing campaign. To generate a list, see [Section 4.2.8, "Generating Lists from Scoring Run Results"](#).

4.2.7.1 About Scoring Run Statuses

The table below describes the seeded statuses for scoring runs, and tells you:

- The meaning of each status
- What status the scoring run can be changed to
- What fields you can modify
- If you can copy scoring runs with that status

Table 4–9 Scoring Run Statuses

Status	Meaning	Can reset to	What you can modify	What you can copy
Draft	Initial status for all scoring runs.	Archived (manually)	All fields.	Create an identical scoring run with a different name and status of Draft.
Scheduled	The scoring run is scheduled.	Draft by cancelling the scoring run.	All fields.	Create an identical scoring run with a different name and status of Draft.
Running	The application is in the process of scoring the target population.	Draft by cancelling the scoring run.	Data selections are locked.	Create an identical scoring run with a different name and status of Draft.

Table 4–9 Scoring Run Statuses

Status	Meaning	Can reset to	What you can modify	What you can copy
Invalid	A scoring run that completed successfully (status was Completed) has been invalidated. See Invalid below for more information.	Archived (manually)	All fields.	All scoring run fields are locked and cannot be modified.
Failed	An error occurred while generating or previewing a scoring run. View the log, make the necessary changes, and resubmit it for a run or preview.	Archived (manually)	All fields.	All scoring run fields are locked and cannot be modified.
Previewing	The run has been submitted for previewing. If the preview is: - successful, the status changes to Draft. - unsuccessful, the status changes to Failed. A request to score will terminate the preview operation.	Scheduled by setting up a run time.	All fields.	Create an identical scoring run with a different name and status of Draft.
Completed	The scoring run finished and was successful.	Archived (manually)	All fields.	Create an identical scoring run with a different name and status of Draft.
Archived	Archived scoring runs appear only in the All Scoring Runs list. The application automatically deletes any source data for the scoring run.	Cannot be reset.	Data selections are locked.	Create an identical scoring run with a different name and status of Draft.

Invalid

A successful scoring run can be changed to Invalid when any of the following conditions occur.

- Scoring runs based on seeded data sources, modifying the data sources (workbooks, lists or segments) or changing any operations (include, exclude or intersect) will result in an invalid scoring run.
- For scoring runs using user-defined data sources, changing the attributes or workbooks will result in an invalid scoring run.
- Changing the Selection Method or Record Count for the scoring run data selections will result in an invalid scoring run.

Invalid scoring runs can be regenerated. If the run is successful, the status is changed to Completed. If the run fails, the status is changed to Failed.

4.2.8 Generating Lists from Scoring Run Results

To generate a list based on the results of a scoring run, follow the steps below.

Prerequisites

The scoring run status must be Completed.

For more information on scoring run statuses, see [Section 4.2.7.1, "About Scoring Run Statuses"](#).

Steps

1. Navigate to Analytics > Scoring Runs.
2. Locate the scoring run using one of these methods:
 - Scroll through the list.
 - In the Quick Find field, select Scoring Run. Then enter one or more letters of the scoring run name in the empty field and click Go.
 - Open the Saved Searches list, select a search, then click Search.
3. Click the scoring run name. The Scoring Run - Details/Create page appears.
4. Click the Results link. The Scoring Run Details - Results page appears.
5. Select the deciles you want to include in your list by selecting the appropriate check boxes.
6. In the List Name field, enter a name for the list.

7. Click Generate List.

Note: To generate a list, the Workflow Background Process must be running. See your System Administrator or refer to the *Oracle Marketing Implementation Guide* for more information on the Workflow Background Process.

8. To view the list, navigate to Audience > List.

4.2.9 Copying a Scoring Run

To copy a scoring run, follow the steps below.

Prerequisites

The status of the scoring run must be draft, scheduled or completed.

For more information on scoring run statuses, see [Section 4.2.7.1, "About Scoring Run Statuses"](#).

Steps

1. Navigate to Analytics > Scoring Runs.
2. Locate the scoring run using one of these methods.
 - Scroll through the list.
 - In the Quick Find field, select Scoring Run. Enter one or more letters of the scoring run name in the empty field, then click Go.
 - Open the Saved Searches list, select a search, then click Search.
 - Click Copy, enter one or more letters of the scoring run name to filter the list, then click the search icon.
3. Click the scoring run name.
4. In the New Scoring Run Name field, enter a name for the new scoring run.
5. To select a new owner:
 - a. Delete the name from the Owner field.
 - b. Click the search icon.
 - c. Click the name of the new owner.

6. Optional. In the Description field, enter a description for the scoring run.
7. Select the check boxes corresponding to the information you want to copy to the new scoring run:
 - Main: Selected by default. The general scoring run information entered in the Scoring Run Details page for the scoring run you are copying.
 - Selections: The target population for the scoring run you are copying.
 - Team: Collaborations that were set up for the scoring run that you are copying.
8. Click Copy, or click Restore to clear the fields.

4.2.10 Creating Personalized Searches

You can create advanced, personalized searches to filter the list of models and scoring runs displayed by the application. You can implement search criteria that locates models and scoring runs:

- Created by all users
- Created by you
- That belong to your team

To create a personalized search, follow the steps below.

Steps

1. Navigate to Analytics. The Model Details page appears.
 - To create new model searches, click Personalize.
 - To create new scoring run searches, click the Scoring Runs tab, then click Personalize.
2. In the Search Criteria section:
 - a. Click Modify Criteria. The Model Search Criteria page appears.
 - b. Select the appropriate check boxes, then click Update.
 - c. Finish defining your search criteria by selecting values from any lists (such as Name), and by entering values in the associated fields.
3. In the Filter search by section, choose the appropriate option.

4. In the Display Options section, use the arrow buttons to move columns from one pane to the other.
 - The columns in the Displayed Columns pane are the ones you will see when working with the application.
 - To change the order of the columns in the Displayed Columns pane, select the column name, then click the up or down arrow.
5. Optional: Select one or more criteria for the sorting order.
6. In the Number of rows field, enter a value for the number of rows you want displayed per page.
7. In the Save Search As section, enter a name for the search in the Search Name field.
8. To see the results of this search criteria when you open the Models Detail or Scoring Runs Detail pages, select the Use as Overview Page Default check box.
9. Click Save or Save and Apply to save your search, or click Restore to delete your changes.

4.2.11 Viewing Logs

For Data Mining, the log sequentially summarizes the back-end process occurs during model builds and scoring runs. If your build or scoring run fails, you can view the log to help determine the cause of the failure. Log entries are listed in ascending order.

Using Trade Management

This chapter describes key Trade Management concepts and procedures. Sections include:

- [Section 5.1, "Trade Management Concepts"](#)
- [Section 5.2, "Trade Management User Procedures"](#)

5.1 Trade Management Concepts

This section contains the following topics:

- [Section 5.1.1, "Trade Management Overview"](#)
- [Section 5.1.2, "Trade Management Offers Overview"](#)
- [Section 5.1.3, "Trade Management Budget Overview"](#)
- [Section 5.1.4, "Trade Management Claims Overview"](#)

5.1.1 Trade Management Overview

Trade Management provides the tools that address three functional areas critical to B2B interactions in various industries: promotional planning and execution, budgets management, and deduction management. Robust promotional planning capabilities enable manufacturers to better manage their trade spending while ensuring optimal effect and impact of promotional executions. Support of efficient and cohesive budgeting and financial processes eliminates wasteful spending and ensures that trade funds are allocated as needed and utilized as intended.

Comprehensive claims processing and deduction management capabilities reduce and control the short-payment problem endemic in many industries.

Trade Management empowers all areas of a manufacturer's business to operate more effectively. Closed loop planning, execution, and analysis tools and solutions enable you to optimize the execution and impact of marketing and sales campaigns, co-op programs, and trade promotions across the entire demand chain, from manufacturer to wholesaler to retailer--and ultimately to the consumer. Trade Management will measurably improve the return on investment for business-to-business interactions.

Trade Management functionalities can be grouped into three major areas that are described in the following sections:

- [Section 5.1.1.1, "Trade Planning and Execution"](#) (Offers management)
- [Section 5.1.1.2, "Budget Management"](#)
- [Section 5.1.1.3, "Claims and Deductions"](#)

5.1.1.1 Trade Planning and Execution

Trade planning functionality, such as promotion forecasting, provides the trade professional with the tools necessary to evaluate and consider historical data when designing a promotional offer. The Manufacturer's ROI Calculator enables the user to perform cost-benefit analysis in order to determine the ideal product, price, and promotion proposition for a specific customer target.

By supporting the automation of trade execution, Trade Management enables marketing and trade users to create and execute trade promotions and enables sales representatives to create and execute trade deals. These executions can also be tied to performance requirements and closely monitored for retail compliance. These tools improve the value proposition for their customer base, as well increase profit margins for the manufacturer.

Trade Management facilitates the coordination of field sales promotions with consumer campaigns. Integration with Oracle ERP applications ensures that all promotional pricing is immediately updated providing accurate invoicing and minimizing pricing errors.

With the insight provided by Trade Planning functions, sales organizations can be proactive as opposed to reactive with their promotional executions. Trade Management's Trade Planning functions provide sales personnel with a comprehensive set of tools which help increase their selling effectiveness thus maximizing sales volumes.

Key features in this area include:

- Calculation of promotional ROI with Trade Management's offer-forecasting feature and Manufacturer's ROI calculator
- Comprehensive support for discount types, including off-invoice, accruals, lump sum payments, volume rebates, and scan data offers
- Retroactive Pricing Adjustments
- Retail monitoring tools with the Performance side navigation links

5.1.1.2 Budget Management

The budget management functionality provides you with a set of tools to create and control marketing, sales and partner channel development funds, and accrual-based budgets commonly known as live funds. Specific budget types can be created using a variety of parameters such as brand, products, territories, and customers. Flexible budget eligibility rules by product, customer, territory, and time period can be set to control budget usage. Budgets also record all payment activities for all

promotional claims and deductions. In sum, the Budget module provides a central repository for all sales, marketing and partnering fund usages and allows companies to maintain control over their spending.

Key features in this area include:

Fixed and Fully Accrued Budgets – A fixed budget is a pool of money dedicated to funding promotions for different customers, products and product families. A fully accrued budgets (live fund) starts at zero and increases according to customer sales.

Integration with All Ordering Channels – The Funds Accrual Engine fetches back all offer adjustments and accruals information from all ordering channel whether it is Order Management, iStore or Quoting.

Accrual Management and General Ledger Integration – The Fund Accrual Engine is a robust program that not only fetches information back from the ordering channels, but also handles manual adjustments and automatically calculates changes to accruals based on return order, changes to volume rebate offer accrual based on cumulative sales volume changes, the spreading of lump sum offer accruals, and scan data promotion accrual changes based on actual scan data. General Ledger entries are created for all accruals so that sales/expenses and liabilities can be tracked in GL.

Top-down Bottom Up Budgeting – Budgets can be allocated to various users in a territory hierarchy based on the territory's historical sales data. These users can submit feedback or negotiate a different allocation during the budgeting process.

Comprehensive Administrative Tools – Such include the ability to transfer, request, delete, copy and reconcile budgets, to send out notifications based on budget thresholds, to set approval rules, to re-calculate committed funds based on actual utilizations and to report on the rollup total amount for a whole budget hierarchy even when multiple currencies are used.

5.1.1.3 Claims and Deductions

The claim functionality enables you to manage the processes required to reconcile all claims, deductions and overpayments.

These processes available include the research, validation, and settlement of all claims, regardless of whether the customer requests payment in the form of a check or a credit, whether it is a deduction related to a particular transaction or not, whether a claim or deduction is related to a promotion or not. The claims module provides users with access to customer transactions information to assist in the research and settlement process.

Key features in this area include:

- **Deductions and Overpayments Management with Auto-Resolution** – Whenever customers remit their payments into the Oracle Receivables system, and a deduction or overpayment is realized, the Oracle Receivables system creates the deductions and overpayments in Trade Management. Such deductions and overpayments can then be settled by RMAs (return material authorizations, or called return orders), credit memos, write offs, chargebacks, debit memos, receipt write offs and on account cash in an automated fashion via tight integration with Oracle Receivables.
- **Claims Management** – Claims can be created in Trade Management as customers submit billback requests, associated to promotional accruals, and settled automatically by either a check, a credit memo or an RMA. In addition, the Autopay program can be used to automate the process of creating claims based on promotional accruals information. The Claims module interfaces with Oracle Payables, Oracle Receivables and Oracle Order Management to settle claims, and with General Ledger to create accounting entries for promotional accruals impacting liabilities and clearing accounts. In addition, a contra charge settlement method allows companies to offset their Oracle Receivables and Oracle Payables balances.
- **Assignment** – Claim owners can be assigned based on multiple attributes by creating claim territories. An API is also available for further assignment needs.
- **Research Tools** – These tools include the use of Discoverer, the display of promotional accrual information on the Associate Earnings screen, access to the customer's 360 view, Claims Aging view and task management features.
- **Comprehensive Administrative Tools** – These tools include claim type, claim reason, action templates with defaults, split, team security

5.1.2 Trade Management Offers Overview

An offer is a generic term referring to incentive designed to entice the target customer to purchase your product or service. It is sometimes called a promotion or trade promotion when it is created by a marketer or trade user targeting specific trade customers. When referred to by a sales representative targeting a specific account, it's mostly referred to as a trade deal. It can take several different forms depending on who your target audience is and what you want the offer to accomplish.

This section includes the following topics:

- [Section 5.1.2.1, "Offer Planning"](#)
- [Section 5.1.2.2, "Offer Execution"](#)

5.1.2.1 Offer Planning

To create the best possible offers, you should clearly understand the:

- Different offer types ([Section 5.1.2.1.1, "Offer Types"](#))
- Sourcing rules ([Section 5.1.2.1.2, "Sourcing"](#))
- Budget offer validation option ([Section 5.1.2.1.3, "Budget-Offer Validation"](#))
- Forecasting and ROI calculation flow ([Section 5.1.2.1.4, "Offer Forecasting"](#))

5.1.2.1.1 Offer Types Oracle Trade Management supports various offer types:

Table 5–1 Trade Management Offer Types

Offer Type	Description	Example
Off Invoice	Amount or percent discounted from an invoice	Buy a specified quantity and receive a percent discount off the purchase. The quantity may be <i>tiered</i> which will be detailed later. Also known as On-Invoice Offer.
Order Value	Discount based on the entire order value	Example 1: Spend \$100 and receive 10% discount off the purchase. Example 2: Spend \$200 and receive 20% off the purchase.
Promotional Goods	Purchase a good or service and receive an additional good or service at no charge	Purchase a DVD player and receive 10 free DVD Rentals.
Terms Upgrade	An incentive discount on the costs associated with a purchase	Purchase \$100 worth of items and receive free shipping.
Accrual	Incentive offered to a reseller or distributor based on cumulative purchases made over a specific time period.	Example 1: For all purchases made for the year a retailer may receive 5% Marketing Development Funds from the manufacturer. Example 2: Fly 16 segments on an airline and receive one free round trip ticket.
Lump Sum	An incentive offered for a purchase and/or action. Lump Sum offers generally target specific customers and require a specified action (called Performance) by the customer. Utilized in Trade Management only	A manufacturer offers a national retailer \$20

Table 5–1 Trade Management Offer Types

Offer Type	Description	Example
Trade Deal	An incentive offered to a reseller or distributor in return for promoting a manufacturer's goods or services. The incentive offered may take the form of an Accrual or an Off Invoice incentive and target a specific product or product family. Trade Deals are utilized in Trade Management only	A manufacturer is launching a new product. To create consumer awareness the manufacturer may offer a large national retailer a 15% discount off purchases of the new product for one month. In return the retailer must commit to featuring the new product in feature display at the front of the store for a month.
Volume	Covers the cumulative purchase of specified goods as they are shipped to the customer. These offers typically include multiple performance tiers. As customers approach a new tier, they may be motivated to purchase more goods to receive a larger incentive. Incentives can be in the form of pure discounts. You can also structure them so that they are applied to a: – Customer's open invoices – Customer's account as a credit – Discretionary business development fund Volume offers also provide you with another variable from which to develop revenue forecasts and inventory planning strategies.	A volume offer for a specific period of time might have this type of structure. Purchase the following amounts cumulatively and receive the related incentive. \$100,000 — 3% incentive \$200,000 — 4% incentive \$300,000 — 5% incentive
Scan Data	Manufacturer sponsored coupons, consumer rebate programs, or discounts that are redeemed by consumers at retail outlets. The offers are then processed by third party clearing houses that pass the data to the manufacturer who, in turn, reimburses the retailer. In some cases the retailer may submit the data directly to the manufacturer, who validates the data and reimburses the retailer. Scan Data offers are commonly used by companies in the consumer goods industry.	A manufacturer issues a coupon for 25 cents off the retail price of its orange juice product. Consumer redemptions can be posted throughout the range of the offer or at completion of the promotion by the retailer or a third party clearing house. Depending upon the posting method, the retailer is reimbursed either throughout the promotion or after its completion.

5.1.2.1.2 Sourcing Trade Management provides you with flexibility when defining a funding source for your offers. You can set up individual offers to source from a campaign (parent) or directly from a budget.

When a campaign is the funding source of an offer, the campaign acts like a mini-budget. The offer can only source up to the available amounts the campaign includes.

Sourcing funds from a campaign or a budget allows you to:

- Create multiple campaigns from a single budget
- Assign owners to specific campaigns
- Monitor spending more closely

When using this functionality, keep in mind the following implications. If you select multiple budgets to source a campaign, the costs post to the various budgets proportionally, aligned with the campaign sourcing spread against the budget. For example, Offer 1 has a committed amount of \$20,000 and sources its funds from Campaign 1. Campaign 1 sources its funds from three budgets in the following proportions:

- Budget 1 — 30%
- Budget 2 — 30%
- Budget 3 — 40%

Postings against the various budget checkbooks for Offer 1 occur in the same proportions that Campaign 1 sources its funds from the three budgets. If the entire committed amount of \$20,000 is utilized, then the postings would be distributed as follows:

- Budget 1 — \$6,000 (30% of \$20,000)
- Budget 2 — \$6,000 (30% of \$20,000)
- Budget 3 — \$8,000 (40% of \$20,000)

5.1.2.1.3 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.

If validation fails, a revert status process starts, thus reverting the status of an offer from submitted or pending to its previous status. A notification is sent at the same time to the offer owner.

See the *Oracle Marketing Implementation Guide* for more information on setting up this functionality.

5.1.2.1.4 Offer Forecasting The function of offer forecasting allows the trade user to utilize base sales (prior year performance) as a base line for predicting the performance of a new offer. The trade user, by analyzing historical sales performance segmented by three dimensions; time range, product, and market (account) is provided a rational foundation from which to set reasonable and expectable sales targets and acceptable ROI for both the manufacturer and the retail customer. This simplifies the act planning account-specific contributions to a campaign and predicting the overall performance of campaigns and offers.

The following rules and conditions apply to offer forecasts:

- Forecasts can be created for all types of offers except Order Value because an Order Value Offer does not have any product specification.
- Forecasts can be created at any offer status.
- Forecasts can be created only if there is at least one customer and one product selected in the offer. Multiple customers and products are supported. Products are selected on an offer's main details page. Customers are selected via various ways on an offer's market eligibility page.
- Before it is frozen, user can update Forecast. Once frozen, a Forecast for any customer 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 using the Create Next Version button.
- Forecast is created in quantity, not monetary value.
- Forecasts can be created on 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 offers by customers and products.

The Manufacturer's ROI Calculator The Manufacturer's ROI Calculator is tightly integrated with the offer forecasting functionality and is designed to provide the trade user a multi-functional planning tool that will aid 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.

Depending upon the status of a promotional activity, the Manufacturer's ROI Calculator may serve as a planning worksheet for the user or as a barometer that measures the effects of an offer as performance actually occurs. With access to actual performance and expenses as they occur, the user may measure updated returns against forecasted sales revenue and associated costs. In turn, trade users may plan, strategize and execute accordingly.

5.1.2.1.5 Offer Status The different offer statuses refer to the different stages that an offer is in. Each status has certain implications on offer behavior. The statuses are defined below.

Table 5–2 Offer Statuses

Offer Status	Description
Draft	The offer is in a draft mode where any change can be made. From a draft status you can either cancel it or request approval to make it active (by clicking on the "Request for Approval" button to start the approval process).
Submitted for Budget Approval	The offer has been kicked on in the approval process. The owner(s) of budget source(s) have been notified for the request. The offer is read-only in this status.
Rejected for Budget Approval	The request has been rejected. User can make necessary changes and click on Request for Approval again to re-start the process.
Active	The offer is in effect after the proper approvals have been obtained. Only certain information can be edited at this point. You may not add or modify discount rules at this point.
On-Hold	The offer is temporarily being put on-hold and can be changed back to active by switching the status.
Terminated	If the offer did not perform as well as expected and it can be stopped before it goes its full cycle. An offer can be terminated if it is in active status or if it is on-hold.
Completed	The offer has performed satisfactorily and we want to complete it to reconcile a budget.
Closed	An offer with the status of Completed can be manually changed to Closed. A closed offer can no longer be associated with new leads generated from Oracle Sales Online.

Table 5–2 Offer Statuses

Offer Status	Description
Pending Validation	If the approval process is turned off by default Pending Validation will be shown as the status while the system checks for product and market eligibility after the request for approval button has been clicked on.

5.1.2.2 Offer Execution

Sections include:

- [Section 5.1.2.2.1, "The Account Generator"](#)
- [Section 5.1.2.2.2, "Retail Execution Tracking and Monitoring"](#)
- [Section 5.1.2.2.3, "Backdating Offer Utilization Adjustments"](#)
- [Section 5.1.2.2.4, "Offer Security"](#)

5.1.2.2.1 The Account Generator You can post promotional accruals for accrual, lump sum, accrual-type trade deals, scan data, and accrual-type volume offers to the general ledger (GL). These postings happen to some GL accounts. These accounts are configurable by customizing Account Generator workflow. Customization is done through the workflow tool. In short, 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)

5.1.2.2.2 Retail Execution Tracking and Monitoring When extending a promotional offer a manufacturer may require a retail customer to perform specific activities or performance in order to receive a promotional incentive. For instance a retail customer may be required to feature a certain product in an end-of-aisle display or feature the manufacturer's product in a promotional flyer delivered to the consumer.

The Trade Management Performance enables the trade user to identify and detail retail activity requirements as part of a promotional offer and then monitor the retail customer's performance and compliance. The ability to monitor and track retail performance and compliance also aids the manufacturer in the claims verification and resolution process.

5.1.2.2.3 Backdating Offer Utilization Adjustments Manufacturers in the consumer goods industry frequently enter into trade commitments with customers that span months, quarters even an entire calendar or fiscal year. These trade commitments are commonly referred to as Performance Programs, Purchase Contracts or National Agreements. Typically these commitments are made with a manufacturer's largest most influential customers.

The scope of these trade commitments can include specific requirements agreed upon between the retailer and manufacturer regarding products, pricing, shipping rules, margin requirement consideration, returns policy, merchandising support, etc. The number of products involved in such commitments can range from a small number of specific SKUs, a family of products, new products or even entire brand catalog. The majority of time the agreement will encompass a large number of products.

Considering the range of products involved, the discounts and incentives agreed upon typically range in value as well. Manufacturers attempt to find equilibrium between their margin needs and the customer's margin requirements and thus agree to a certain level of discount or incentive for the term of the commitment.

Given the number of parameters involved and business areas impacted, the final agreed upon terms in the commitment may take many months to finalize. Despite the potential for a final agreement to be struck months after the onset of a calendar or fiscal year, a manufacturer must continue to ship their products to the customer. The manufacturer and customer will conduct business under a temporary agreement with the caveat that the final terms of the deal may change. When the final terms are agreed upon, and if they differ from the initial temporary agreement, the manufacturer must have the ability to modify the variables of an offer including the discount or incentive amount and products involved.

These scenarios require that manufacturers have the ability to easily alter the original conditions of an offer while the offer is still active. With backdating functionality, Trade Management allows a user to enter an active offer and adjust the discount terms and product group involved. The adjustment will consider the business activity that preceded the change and make the necessary adjustments regarding the discount/incentive. The function will also accommodate the adjusted terms for the remaining time of the offer.

5.1.2.2.4 Offer Security The security feature is designed to allow only users who create or who are owners of a promotional execution the ability to view and update the parameters of an offer. For example, a Vice President of Sales or Regional Sales Director may view and update Offers for their reporting subordinates. Security for Offers permits select users to view promotional activity vertically through the sales

hierarchy while limiting visibility across the hierarchy. For example, peer sales representatives of the same region and who manage separate account bases may be denied editing and in some cases viewing rights to each others promotional activities.

5.1.3 Trade Management Budget Overview

Trade Management provides budgeting and accrual management functionalities within its Budgets module. The functionalities are grouped and described under the following section headings:

- [Section 5.1.3.1, "Budget Planning"](#) including:
 - [Section 5.1.3.1.1, "Fixed Budgets"](#)
 - [Section 5.1.3.1.2, "Fully Accrued Budget"](#)
 - [Section 5.1.3.1.3, "Market Eligibility"](#)
 - [Section 5.1.3.1.4, "Product Eligibility"](#)
 - [Section 5.1.3.1.5, "Budget Allocation"](#)
 - [Section 5.1.3.1.6, "Top-down, Bottom-up Budgeting"](#)
- [Section 5.1.3.2, "Budget Execution"](#) including:
 - [Section 5.1.3.2.1, "Budget Request"](#)
 - [Section 5.1.3.2.2, "Budget Transfer"](#)
 - [Section 5.1.3.2.3, "Off-invoice Type Offers — Integration to Sales Orders"](#)
 - [Section 5.1.3.2.4, "Accrual Management — Integration to Sales Orders"](#)
 - [Section 5.1.3.2.5, "Basic General Ledger Integration"](#)
 - [Section 5.1.3.2.6, "Recalculated Committed"](#)
 - [Section 5.1.3.2.7, "Budget Reconciliation"](#)
 - [Section 5.1.3.2.8, "All Offer Adjustments"](#)
- [Section 5.1.3.3, "Budget Tracking"](#) including:
 - [Section 5.1.3.3.1, "Buckets"](#)
 - [Section 5.1.3.3.2, "Utilized Column"](#)
 - [Section 5.1.3.3.3, "Paid Column"](#)
 - [Section 5.1.3.3.4, "Campaign Checkbook"](#)

- [Section 5.1.3.3.5, "Offer Checkbook"](#)
- [Section 5.1.3.3.6, "Customer Checkbook"](#)
- [Section 5.1.3.3.7, "Rollup View"](#)
- [Section 5.1.3.4, "Budget Administration"](#) including:
 - [Section 5.1.3.4.1, "Budget Statuses"](#)
 - [Section 5.1.3.4.2, "User Statuses"](#)
 - [Section 5.1.3.4.3, "Budget Thresholds"](#)
 - [Section 5.1.3.4.4, "Budget Delete"](#)
 - [Section 5.1.3.4.5, "Copy Budget"](#)

5.1.3.1 Budget Planning

The topics presented in this section include:

- [Section 5.1.3.1.1, "Fixed Budgets"](#)
- [Section 5.1.3.1.2, "Fully Accrued Budget"](#)
- [Section 5.1.3.1.3, "Market Eligibility"](#)
- [Section 5.1.3.1.4, "Product Eligibility"](#)
- [Section 5.1.3.1.5, "Budget Allocation"](#)
- [Section 5.1.3.1.6, "Top-down, Bottom-up Budgeting"](#)

5.1.3.1.1 Fixed Budgets A fixed budget is a pool of money with a value greater than zero that is designated as a fund for 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 start at zero and only go up according to customer sales.

Users can allocate fixed budgets based on territories set up for Trade Management in the CRM Administration module called Territory Manager. (For details, please see section below for Territories for Budgets.) You can relieve a fixed budget in a number of ways including but not limited to the following:

- Accruals (also known as Off-invoice in Europe and other regions)
- Off Invoice (also known as On-invoice in Europe and other regions)
- Lumpsum

Other core marketing activities such as campaigns and events can also be funded from a fixed budget.

The following is an example of how an accrual offer updates the budget.

A fixed budget is set up for all sales and marketing activities for customers in the United States for \$1 million. The country US is divided into four regions each with a sales manager. The manager of the region US West gets an allocation of \$500,000. A sales rep from the region then decides to give a promotion to one of his customers whereby every time the customer buys a unit of product X, 10% is accrued. Such accruals may later be paid back to the customer via a claim (in turn settled by a check or a credit memo) or a deduction (in turn settled by a credit memo). The sales rep estimates that the promotion will cost \$10,000 and he asks the sales manager for \$10,000 to fund the offer. When this fund request is approved, the US West budget looks as follows:

Total	Committed	Utilized	Paid
500,000	10,000	0	0

A customer places an order for 50 units of the product which has a regular price of \$100. An accrual of $\$100 \times 50 \times 10\% = \$500$ is created.

The Funds Accrual Engine (a concurrent process scheduled to run in the background) fetches the accrual information and updates the budget as follows:

Total	Committed	Utilized	Paid
500,000	10,000	500	0

Depending on the industry, the use of fixed budgets versus fully accrued budgets is different. For example, companies that fall within the broad definition of the consumer goods sector may have an average of 40:60 (40% of their budgets on a fixed basis, 60% on a fully accrued basis); while the more traditional food and beverage 10:90 (10% of their budgets on a fixed basis, 90% on a fully accrued basis).

The benefits of using a fixed budget are that it encourages more up front planning and provides better budget estimates in advance. The benefits of using a fully accrued budget are that it relieves a company from the pressure of having to perform rigorous budget planning that requires time and resources it does not necessarily have, and that it allows a company the ability to accrue budgets based on real time sales data.

5.1.3.1.2 Fully Accrued Budget A fully accrued budget (live fund) starts at zero and increases according to customer sales. Accrual parameters can be defined, for example, accrue 3% for product X. A fully accrued budget can have multiple accrual parameters for products or product families just like in offers. This makes the administration of a fully accrued budget easy and flexible.

For example, you can define one fully accrued budget which states that:

1. If a customer buys product X, then accrue 3%.
2. If a customer buys product Y, then accrue 4%.
3. If a customer buys product Z, then accrue 5%.

Once defined, accrual parameters are automatically passed to Advanced Pricing (QP). In the background, a fully accrued budget actually creates an accrual offer.

In addition, fully accrued budgets can be created to accrue to different levels as described in the table below.

Table 5–3 Accrue to Levels for Fully Accrued Budgets

Accrue to Level	Liability Flag	Budget Columns Updated	Comments
Customer	On	Total, Committed, Utilized	Customer purchases, accrues, and can later claim for it or deduct based on it.
Customer	Off	Total	Customer purchases. Money is accrued but the customer is not entitled to get it right away. Money accrued in this fashion can pay for negotiated discounts, sales and marketing costs and rebates. For example, additional activities such as special in-store display of the product may need to be performed before the customer can earn the money; a lump sum offer with the performance requirement for special in-store display proofs may then be created and get funding from the budget.
Sales	On	N/A	Not applicable; not supported.

Table 5–3 Accrue to Levels for Fully Accrued Budgets

Accrue to Level	Liability Flag	Budget Columns Updated	Comments
Sales	Off	Total	Customer purchases. Money is accrued but is given to the sales person (budget owner) who can then spend it with discretion. The customer does not know about this kind of accrual. The sales person can then turn around and use the money to fund any of his promotions to any of his customers.

Notice the difference between an accrual offer and a fully accrued budget. An accrual offer gets funding from a budget and will first increase the budget's Committed column when the funding is approved, and then later on increase the Utilized column as sales take place and accruals are created. A fully accrued budget, on the other hand, updates the budget according to how it is set up as explained in the table above. These two accrual types are separate activities and can even occur simultaneously on the same order transaction.

You are not limited to any number of fully accrued budgets created for any given customer. For example, a company can set up a fully accrued budget for all of its customers. It can also then establish a second fully accrued budget for a specific customer grouping, such as all customers in a particular territory, or selling items from a specific product areas, like paper and janitorial supplies. It also supports buying group related accruals.

Depending on the industry, the use of fixed budgets versus fully accrued budgets is different. For example, companies that fall within the broad definition of the consumer goods sector may have an average of 40:60 (40% of their budgets on a fixed basis, 60% on a fully accrued basis); while the more traditional food and beverage companies may have a more skewed ratio such as 10:90 (10% of their budgets on a fixed basis, 90% on a fully accrued basis).

The benefits of using a fixed budget are that it encourages more up front planning and provides better budget estimates in advance. The benefits of using a fully accrued budget are that it relieves a company from the pressure of having to perform rigorous budget planning that requires time and resources it does not necessarily have, and that it allows a company the ability to accrue budgets based on real time sales data.

5.1.3.1.3 Market Eligibility Market eligibility defines what customers or customer groups the budget is targeting.

For a fixed budget, market eligibility serves two purposes: classification and validation. There is an option to validate that the eligibility of an offer falls within the targets of the budget. For example, a budget may be created for all the customers in the US West region. If a sales person then creates an offer to give to a customer in the US East region, then the validation will fail, and the offer will not be able to get money from the budget.

Eligibility for a fixed budget can be defined for the following:

- **Individual customers**

The individual customers can be sold to, bill to, or ship to accounts. The accounts are in the Oracle Trading Architecture Community (TCA). The following example illustrates the differences between sold to, bill to, and ship to accounts.

John goes to a web store to place an order. He is the sold to account. If he is not the one paying for it, but his sister Mary is, then Mary is the bill to account. John then indicates that the order should be shipped to a friend's place as a wedding gift. The friend is the ship to account.

- **Buying Groups**

Buying Groups are organizations formed when companies group themselves together to leverage on higher purchase volume achieved as a group. This may allow them to negotiate better prices or discounts when purchasing from a manufacturer. Buying Groups are commonly found in the broad definition of the consumer goods sector.

Buying groups are formed in Trade Management by linking various TCA parties together based on a pre-determined party relationship.

- **Lists**

Lists are groupings of customers or customer contacts created based on user specified criteria. The criteria can be specified using Discoverer workbooks or queries.

For example, a user may query up all the customers with revenue < \$100 million in the California state in the United States who have purchased something from the company in the last 2 months. His query returns 500 of such customers in his database. The user saves the results of this query and calls it the "California Small Business Customers with Purchases in the Last 2 Months" list.

- **Segments**

Segments are also groupings of customers or customer contacts. Like lists, they are also created based on user specified criteria via Discoverer workbooks or writing queries.

For example, a user may query up all the customers with revenue < \$100 million in the whole United States. He saves this query and calls it a US Small Business Customers segment.

The technical difference between a list and a segment is that the former is static while the latter is dynamic. In other words, the list called California Small Business Customers with Purchases in the Last 2 Months, once created, will always contain the same 500 customers. The US Small Business Customers segment, on the other hand, will fetch the current results of the query; for example, this month there may be 2000 customers in this segment, but next month there may be 1900 of such customers in the segment.

- **Territories**

Territories are another way to group customers together. They are created in the CRM Foundation module Territory Management.

Territories can be created based on various customer and geographical attributes such as customer name, account code, customer category, account hierarchy, city, country, county, postal code, province, state, account classification, party relation, site classification, customer profile, sales channel. They can be arranged in a hierarchy. For example, a territory called US West may be created to include all the customers within the US Western states.

When validation between the market eligibility of a budget and that of an offer happens, the validation will look at all the customers the budget targets, and see if the customers the offer targets are included in the budget's. For example, if the budget is created for the US West territory, while an offer is created for the California territory, then the offer can get money from the budget since it falls within the targets of the budget. If the offer is created for a customer in Canada, however, then validation will fail and the offer will not be able to get money from the budget.

In organizations where there are hundreds of budgets created for various purposes, and a lot of promotional offers created, such validation ensures that money set aside for a particular purpose is really used for that purpose.

For a fully accrued budget, on the other hand, market eligibility can be defined by fully using the configurable Qualifier Contexts and Attributes as set up in Advanced Pricing. Using the qualifier contexts and attributes, all of the same

market eligibilities available for fixed budgets (customers, buying groups, lists, segments, territories) are available for fully accrued budgets. In addition, more groupings can be configured.

Market eligibility for a fully accrued budget serves the following main purposes:

- Defining which customers or customer groups qualify to get the accruals
- If the fully accrued budget is either accruing to the sales level, or to the customer level with the liability flag off, then the fully accrued budget amount can be used to fund offers just like a regular fixed budget. In such cases, the eligibility validation described above will also apply for fully accrued budgets.

5.1.3.1.4 Product Eligibility Product eligibility defines what product, product families, or groups a budget is targeting.

For a fixed budget, product eligibility serves two purposes:

- Classification
- Validation

The validation option checks to ensure that the eligibility of an offer falls within the targets of the budget. For example, a budget may be created for all toy products. If a sales person then creates an offer for games products, the validation will fail, and the offer will not be able to source money from the budget.

Validation occurs at the same time for both market and product eligibilities. In other words, if a budget is created for the US West region and toy products, and an offer is created for customers in the US West region for game products, validation will fail. The offer cannot source money from that budget because the products are different.

Eligibility for a fixed budget can be defined for the following:

- Product
Items from the inventory system.
- Product Category
Categories contain products; category sets contain categories. In fixed budgets, you can specify categories and category sets.

For a fully accrued budget, product eligibility can be defined by using the configurable product contexts and attributes in Advanced Pricing.

5.1.3.1.5 Budget Allocation Budget allocation is the top-down portion of the top-down, bottom-up budgeting process. It enables you to allocate money to each sales territory for your sales people to spend. Using this automated allocation feature, you can perform a number of tasks, including:

- Establishing a top-level value for your budget or allocation fund.
- Distributing roll-down values to the lowest hierarchy levels based on prior year sales (shipped order amounts).
- Predefining a holdback amount to ensure the availability of funds for possible future needs.
- Editing allocation amounts before final allocation.
- Transferring funds from one allocation fund or budget to another.
- Releasing holdback funds incrementally.

Territories in Trade Management:

- Enable you to group customers together. You can create them in the CRM Foundation module called Territory Management.
- Can be created based on various customer and geographical attributes, such as customer name, account code, customer, category, account hierarchy, city, country, county, postal code, province, state, account classification, party relation, site classification, customer profile, and sales channel.
- Can be arranged in a hierarchy.

For example, a sales territory may be called US West. Under it, you could have territories called California and Oregon.

- Are assigned resources or teams.

Budget allocation makes use of territories in the following manner. A fixed budget can be allocated for a particular territory hierarchy. When the allocation is finished, a budget hierarchy mimicking the territory hierarchy is created.

The primary resource for each territory is the budget owner. Other resources in the territory are team members of the budget.

For example, the following is a sales territory hierarchy set up in Trade Management:

US West
California Oregon

The California territory contains customers whose sales totalled \$500K in the prior year. The Oregon territory had \$200K in the prior year. The US West territory had \$300K in the prior year independent of the sales of its child territories. The entire hierarchy had \$1 million in sales in the prior year.

A budget called Sales Budget 2003 for \$10,000 is allocated down this hierarchy without any holdback. Allocation is based on prior year sales. A budget hierarchy is created by the allocation as follows:

Sales Budget 2003

Sales Budget 2003 - US West

Sales Budget 2003 - California Sales Budget 2003 - Oregon

If you view the budget balances, you will see that:

Sales Budget 2003: **\$0**

Sales Budget 2003 - US West: **\$3K**

Sales Budget 2003 – California: **\$5K** Sales Budget 2003 – Oregon: **\$2K**

A rollup view of this budget hierarchy will display as follows:

Sales Budget 2003: **\$10K**

Sales Budget 2003 – US West: **\$10K**

Sales Budget 2003 – California: **\$5K** Sales Budget 2003 – Oregon: **\$2K**

After allocation, the owner of Sales Budget 2003 can access all three budgets below him. The owner of Sales Budget 2003 – US West can access the two budgets California and Oregon.

5.1.3.1.6 Top-down, Bottom-up Budgeting When budget amounts are allocated from management down to lower levels without inputs from lower levels, it is a top-down budgeting process. When budget amounts are rolled up from lower levels to management, it is a bottom up process.

Companies may use a combination of both by first allocating budgets based on some criteria such as prior year sales, then by accepting inputs from lower levels. Multiple such top-down and bottom-up cycles may continue until budget numbers are finalized. This is an automated tool to manage the time-consuming budget

process and to facilitate communication between management and sales people at all levels in the sales hierarchy.

A top budget owner may be a sales or marketing executive. A mid budget owner may be a regional sales manager or marketing manager. Each level of management will see the rollup numbers for his budget and his child budgets. A bottom budget owner may be a field salesperson or a marketing team member. Budget owners in the hierarchy only see the budget and the child budgets for which they are responsible.

5.1.3.2 Budget Execution

The topics presented in this section include:

- [Section 5.1.3.2.1, "Budget Request"](#)
- [Section 5.1.3.2.2, "Budget Transfer"](#)
- [Section 5.1.3.2.3, "Off-invoice Type Offers — Integration to Sales Orders"](#)
- [Section 5.1.3.2.4, "Accrual Management — Integration to Sales Orders"](#)
- [Section 5.1.3.2.5, "Basic General Ledger Integration"](#)
- [Section 5.1.3.2.6, "Recalculated Committed"](#)
- [Section 5.1.3.2.7, "Budget Reconciliation"](#)
- [Section 5.1.3.2.8, "All Offer Adjustments"](#)

5.1.3.2.1 Budget Request A budget request is a request to withdraw money from a budget. A budget request may be submitted by a sales rep who wants to give an offer to his customers. A budget request may also be submitted by the owner of another budget. Requests generally need to get approval before money actually gets transferred. Approval rules can be configured to route different requests to different approvers.

A budget may provide funding for multiple promotions, and vice versa, a promotion can get money from multiple budgets. If an offer sources from multiple budgets, the offer accruals or utilizations will be recorded against the multiple budgets proportionately.

5.1.3.2.2 Budget Transfer While a request is asking for money from another budget, a transfer is moving money to another budget. In any case, all movements of money in and out of any given budget are tracked to provide full audit control.

For example, a fund called New Product Introduction may not need as much money as originally forecasted because the new product was not performing well. A budget user can then transfer money out of it into other budgets so that the money can be spent somewhere else.

5.1.3.2.3 Off-invoice Type Offers — Integration to Sales Orders Off invoice type offers include off invoice, order value, promotional goods, and terms upgrade offers. These offers reduce the price a customer gets invoiced for.

These offers update a budget’s Utilized and Paid columns at the same time. Since these offers reduce the price a customer gets invoiced for, the customer gets paid at the same time he utilizes the offer.

For example, product X is regularly priced at \$100. An off invoice discount offer for 15% is created and gets a committed budget for \$10,000. A customer places an order of 10 units. Due to the discount, he only gets invoiced for and only needs to pay for $\$100 \times 10 \times (100 - 15)\% = \$850$. In this case, the Utilized and Paid are both updated by \$150.

Committed	Utilized	Paid
10,000	150	150

5.1.3.2.4 Accrual Management — Integration to Sales Orders Accrual type offers include accrual, lump sum, scan data and volume offers. These offers do not reduce the price a customer gets invoiced for. Instead, an accrual is created in the background and tracked for customers. The customer can get paid back by submitting a claim or deducting.

Example 1 – Accrual Offer

A sales rep decides to give a promotion to one of his customers whereby every time the customer buys a unit of product X, 10% is accrued. He was approved for \$10,000 budget.

A customer places an order for 50 units of the product which has a regular price of \$100. An accrual of $\$100 \times 50 \times 10\% = \$500$ is created. The budget is automatically updated as follows:

Committed	Utilized	Paid
10,000	500	0

Example 2 – Lump Sum Offer with No Spread

A lump sum offer is created for \$5,000 to be given to a customer if the customer displays some in-store advertisement. The company's policy is to recognize that whole amount in Budget Utilized (as well as a liability account in General Ledger) as soon as the offer starts:

Committed	Utilized	Paid
5,000	5,000	0

Example 3 – Lump Sum Offer with Spread

Alternatively, company policy is to spread the lump sum amount over time. Assume the offer lasts for 10 days. After day one the budget looks as follows:

Committed	Utilized	Paid
5,000	500	0

After day two, the budget looks as follows:

Committed	Utilized	Paid
5,000	1,000	0

In addition, Budget also supports all accrual adjustments as a result of a scan data offer and a volume offer, as well as manual adjustments.

Example 4 – Scan Data Offer

When a scan data offer is first created, forecasts are made regarding the scan units and values by line. The committed offer amount also updates the utilized amount of the budget accordingly. General ledger (GL) postings are created as well. When actual data are received for the offer via a claim, if the actual amount exceeds forecast amount, an automatic adjustment can be created. The original accrual created based on the forecasts, as well as the committed amount, are adjusted.

Whether the automatic adjustment is created or not is based on the setup on the offer itself.

For example, if a Scan Data Offer has the following details:

Total committed = \$10K

Total utilized = \$8K

Offer line 1 utilized = \$5K

Offer line 2 utilized = \$3K

Actual scan data shows the following for the two lines:

Offer line 1 actual value = \$8K

Offer line 2 actual value = \$5K

Total = \$8K + \$5K = \$13K

Based on the comparison between Actuals and Forecasts, adjustments must be created to increase committed as well as utilized:

Adjust committed by $\$[(\text{Actual utilization} - \text{forecast utilization}) - (\text{committed} - \text{forecast utilization})] = \$[(13 - 8) - (10 - 8)] = \$3K$

Adjust utilized by $\$(\text{Actual} - \text{Forecast})$ for each line:

- Adjust line 1 by $\$(8 - 5) = \$3K$
- Adjust line 2 by $\$(5 - 3) = \$2K$

When adjustments are made to the utilization, these GL entries are also created:

Debit Sales or Expense

Credit Liability

Use with Recalculated Committed:

If Recalculated Committed is implemented and the profile to allow Committed to be over Available budget is set to yes, adjustments up can be created without conditions. The Recalculated Committed program itself will skip making any adjustments for scan data offers. This is because of the automatic adjustments which happen for scan data offers when Actual > Forecast, there is no risk of utilized amount for scan data offers to be greater than committed. Otherwise adjustments up can only be created only up to available amount in the budget.

Example 5 – Volume Accrual Offer with Retroactive Flag On

A volume accrual offer, or called a volume rebate, is an offer that accrues for qualified customers based on their cumulative purchase amounts spanning over a period of time. The retroactive flag determines whether past orders should be adjusted as well based on the new accrual rate achieved.

For example, a volume accrual offer might be set up for a customer to accrue based on total sales in the next 6 months as follows:

0 to 1,000: accrue 5%

1,001 to 2000: accrue 8%

2001 +: accrue 10%

Each unit is priced at \$1.00.

The first couple of orders from a customer look as follows:

Order No.	Quantity Purchased	Accrual %	Accrual
1	600	5%	30
2	400	5%	20
3	100	8%	8

Since the Retroactive Flag is on, the system will therefore go back to order 1 and order 2 and make a volume offer adjustment up, as follows:

Order No.	Quantity Purchased	Accrual %	Accrual	Volume Offer Adjustment	Total Accruals
1	600	5%	30	$600 * (8\% - 5\%) = 18$	48
2	400	5%	20	$400 * (8\% - 5\%) = 12$	32
3	100	8%	8		8
Total	1,100				88

The customer places another order:

Order No.	Quantity Purchased	Accrual %	Accrual
4	1,000	10%	100

More volume offer adjustments are made:

Order No.	Quantity Purchased	Accrual %	Accrual	Volume Offer Adjustment 1	Volume Offer Adjustment 2	Total Accruals
1	600	5%	30	$600 * (8\% - 5\%) = 18$	$600 * (10\% - 8\%) = 12$	60
2	400	5%	20	$400 * (8\% - 5\%) = 12$	$400 * (10\% - 8\%) = 8$	40
Total	2,100					210

Order No.	Quantity Purchased	Accrual %	Accrual	Volume Offer Adjustment 1	Volume Offer Adjustment 2	Total Accruals
3	100	8%	8	$100 * (10\% - 8\%) = 2$		10
4	1000	10%	100			100
Total	2,100					210

Example 6 – Volume Accrual Offer with Retroactive Flag Off

Using the numbers in the above example, the following occurs if the retroactive flag is off:

Order No.	Quantity Purchased	Accrual %	Accrual
1	600	5%	30
2	400	5%	20
3	100	8%	8
4	1,000	10%	100
Total	2,100		158

5.1.3.2.5 Basic General Ledger Integration When accruals are created either from a lump sum, accrual, scan data or volume offer, such accruals may be treated as liabilities by some companies that need to be tracked in the General Ledger. Trade Management provides GL integration by creating the following accounting entries.

- Debit Sales or Expense or Charge
- Credit Liability

The debit entry will reduce the balance in Sales or Expense or Charge account selected. If the account selected here is a Sales account, it means that the company is treating the accrual offer as a reduction in the sales revenue. If the account selected here is an Expense or Charge account, it means that the company is treating the accrual offer as a promotional expense. What type of account a company using Trade Management selects here is dependent on its accounting policies.

The credit entry will increase the balance in the Liability account selected.

The reason for the two entries created is to maintain the basic accounting principle which states that the following equation must always hold true:

Asset = Liability + Equity

Sales or Expenses or Charges are called Equity accounts.

For example, an accrual offer is set up to accrue 10% for every unit of a product sold. The product price is \$200. When a customer places an order for 5 units of this product, the following accrual and accounting entries are created:

Accrual amount: $\$200 \times 5 \times 10\% = \$100$

Debit Sales or Expense or Charge \$100

Credit Liability \$100

Asset	Liability
unaffected	Credit \$100 (in other words, increase by \$100)
	Equity
	Debit \$100 (in other words, increase by \$100)

The accounting entries created by Trade Management at the time of accrual use the GL accounts from the following setups:

- As defined for the budget itself. Plus any Account Generator workflow updates (refer to the Advanced General Ledger Integration for details).
- As defined for a budget category. Plus any Account Generator workflow updates.
- As defined in the system parameters. Plus any Account Generator workflow updates.

When claims or deductions are settled with the promotional earnings associated, the liabilities will be reversed and a Receivables Clearing or Payables Clearing account will be credited. For details on these please refer to the Claims sections in this document.

All Trade Management related General Ledger entries are created with a Source in GL called Marketing. The GL categories that Trade Management uses for journal entries created at the time of accrual are:

- Fixed Budgets (for accruals created for accrual offers, lump sum offers, scan data offers and volume offers which get money from a fixed budget)
- Accrual Budgets (for accruals created by fully accrued budget)

5.1.3.2.6 Recalculated Committed Recalculated Committed is an option you can use to recalculate the necessary funding level based on the actual sales performance of a promotion. Funds are increased or decreased automatically.

Recalculated Committed enables Trade Management to measure the variance between what was planned and what actually happened so that over time. Adjustments can be made that result in a more effective use of budgets and funds. It ensures that variances are accounted and adjusted for on an ongoing basis. In a business-to-business environment it is fairly common to establish an offer or deal for a customer or group of customers to run for a set period of time, for example six weeks to a year. Even though sales and marketing will try to forecast sufficient and accurate funding to assure that all orders received that meet the original requirements for the deal, they are not always successful. In addition, in the highly competitive marketplace, manufacturers do not want to commit more funds than are necessary to meet the actual requirements for their promotions. They need to commit all available funds as well as spend all their funds. At year-end, they do not want to see money that has not been utilized.

Recalculated Committed enables them to spend based on available funds adjusted to reflect actual usage or needs based on an even spread or on historic usage. The original committed amounts will be recalculated and adjusted on an actualized basis. This means that those promotions requiring more funds will receive them and those promotions that need less will have their committed amounts adjusted down. This downward adjustment must occur on a timely basis to allow the user to establish new deals within an acceptable time period. Some retailers are now demanding in excess of 6 months notification to accept promotional activities. Although they will always accept additional funds they will not necessarily commit to any activities unless notified well in advance.

Recalculated Committed is currently based on comparing the average committed amount against the actual utilized amount. While the Committed amount determines the maximum of what the Utilized amount can be, the relationship is reversed for Recalculated Committed. If Recalculated Committed functionality is implemented, then the Utilized amount determines what Recalculated Committed amount should be. The Recalculated Committed amount can be higher or lower than Committed amount and higher or lower than Total amount. Even if implemented, subsequent budget requests from offers will still increase the Committed amount of the budget only, not the Recalculated Committed. Offers with a maximum committed indicator, terms upgrade or lumpsum offers are exempt from this feature.

Example 1

An offer was established for a period of 6 months beginning April 1, for a total of 183 days. This offer was created without the use of the forecast tool, so the daily usage values are calculated via the simple methodology. The original committed amount was \$600,000. The average usage accordingly was forecasted at $\$600,000 / 183 = \$3,278.69$ per day.

At the end of month one, the utilization was \$75,000. April has 30 days, so the following calculation is performed.

$$\text{Daily Forecasted Utilization} \times \text{Days Elapsed} - \text{Actual Usage Amount} = \text{Adjustment}$$

$$\$3278.69 \times 30 = \$98,360.70 - \$75,000 = (\$23,360.70)$$

At the end of May the total utilizations equal \$195,000 so the calculation is:

$$\$3278.69 \times 31 = \$101,639.39 - \$120,000 \text{ (May usage)} = \$18,360.61$$

At the end of July the user can choose to change the frequency to weekly by accessing the Recalculated Committed portion in Budgets Admin and changing the frequency to weekly and clicking on update. The calculations would then be performed at the end of each accounting week following the same format.

The offer would never run out of funding. As sales materialize adjustments will be made to assure adequate fund availability. System will automatically create the budget adjustments (positive or negative) referencing the deal/offer number with a description in the comments of recalculated committed adjustment. The adjustments will be sourced from the original sourcing budgets.

Example 2

The following example displays an offer created for 20 days beginning June 1 and ending on June 20, with an estimated committed amount of \$40,000 utilizing the simple methodology.

Original committed is divided by days to arrive at a daily forecasted amount of \$2,000.

Date	Days in Promotion	Daily Forecast ((based on original committed amount/days)	Actual Daily Usage	Required Adjustment – Daily Basis	Required Adjustments – Weekly Basis	Required Adjustments – Monthly Basis
June 01	1	\$2,000	\$3,750	\$1,750		
June 02	2	\$2,000	\$3,300	\$1,300		
June 03	3	\$2,000	\$1,200	(\$800)		

Date	Days in Promotion	Daily Forecast ((based on original committed amount/days)	Actual Daily Usage	Required Adjustment – Daily Basis	Required Adjustments – Weekly Basis	Required Adjustments – Monthly Basis
June 04	4	\$2,000	\$1,000	(\$1,000)		
June 05	5	\$2,000	\$999	(\$1,001)		
June 06	6	\$2,000	\$3,456	\$1,456		
June 07	7	\$2,000	\$200	(\$1800)	(\$95)	
June 08	8	\$2,000	\$300	(\$1,700)		
June 09	9	\$2,000	\$2,000	\$0		
June 10	10	\$2,000	\$1,700	(\$300)		
June 11	11	\$2,000	\$2,333	\$333		
June 12	12	\$2,000	\$3,650	\$1,650		
June 13	13	\$2,000	\$2,600	\$600		
June 14	14	\$2,000	\$1,100	(\$900)	(\$317)	
June 15	15	\$2,000	\$2,200	\$200		
June 16	16	\$2,000	\$2,300	\$300		
June 17	17	\$2,000	\$1,975	(\$25)		
June 18	18	\$2,000	\$1,800	(\$200)		
June 19	19	\$2,000	\$2,200	\$200		
June 20	20	\$2,000	\$2,300	\$300	\$775	\$363
Totals	20	\$40,000	\$40,363	\$363	\$363	\$363

Example 3

The following example is for a promotion established for a full year with an original committed amount of \$200,000. In this example (again, utilizing the simple methodology) the adjustments are done on a monthly basis. Month Days in Promotional Month Daily Forecast (based on original committed amount / Promotional days) Monthly Forecast (based on daily forecast x days in month) Actual Monthly Usage Required Adjustments on a monthly basis.

Month	Days in Promotion Month	Daily Forecast (based on original committed amount/promotional days)	Monthly Forecast (based on daily forecast x days in month)	Actual Monthly Usage	Required Adjustments – Monthly Basis
January	31	\$547.95	\$16,986.30	\$20,000	\$3,014
February	28	\$547.95	\$15,342.47	\$12,000	(\$3,342)
March	31	\$547.95	\$16,986.30	\$16,500	(\$486)
April	30	\$547.95	\$16,438.36	\$17,750	\$1,312
May	31	\$547.95	\$16,986.30	\$12,200	(\$4,766)
June	30	\$547.95	\$16,438.36	\$19,750	\$3,312
July	31	\$547.95	\$16,986.30	\$21,000	\$4,014
August	31	\$547.95	\$16,986.30	\$13,330	(\$3,656)
September	30	\$547.95	\$16,438.36	\$18,850	\$2,412
October	31	\$547.95	\$16,986.30	\$16,000	(\$986)
November	30	\$547.95	\$16,438.36	\$12,450	(\$3,988)
December	31	\$547.95	\$16,986.30	\$10,000	(\$6,986)
Totals	365		\$200,000	\$189,850	(\$10,150)

5.1.3.2.7 Budget Reconciliation Reconciliation is a way to return the following money at the end of an offer:

- Adjusts previously committed, but un-utilized. The funds are transferred from the Committed column to the Available column (Reconcile Un-Utilized)

You might use this when a marketing activity has completed or has been cancelled.

- Adjusts previously utilized, but unpaid funds. The Utilized column is adjusted accordingly, and the amount is transferred from the Committed column to the Available column (Reconcile Un-Utilized and Un-Paid Earnings)

This option is used for accrual based offers such as accrual, lump sum, scan data and volume offers. After an offer ends, customers can still submit claims for it. At some time, however, the company decides to close out the offer and reduce the outstanding accruals recorded against it.

For some companies, this grace period can range widely from a month to a year. For such companies, this grace period is not systematic and therefore should not be limited by the system. Instead, Trade Management allows you to go into the offer whenever you need to do a reconciliation.

Note: Reconciliation can also be performed automatically based on a concurrent process which takes into account a pre-defined grace period. See the *Oracle Marketing Implementation Guide* for more information.

The Reconcile button appears only if the end date of the offer has been reached and status is completed, or if offer has no end date its status is completed.

If the user chooses the option *reconcile un-utilized and un-paid earnings*, the Utilized amount is decreased by the amount of (Utilized – Paid); the same amount is transferred from Committed to Available. If Oracle General Ledger integration is implemented, then at the time Utilized is decreased, the corresponding GL entries are generated:

- Debit Liability
- Credit Sales or Expense

For example, Accruals for an offer = \$10,000. The actual paid = \$8,000. It is now some time after the offer end date. Management conducts a review of this offer and believes no more claims will come in. You can then:

1. Change the status of the offer manually from Active to Completed.
2. Navigate to Budget.
3. Select Reconcile; then select Reconcile Un-Utilized and Un-Paid Earnings.

An adjustment down is made to the sourcing budgets for \$2000. The committed and utilized amounts are decreased.

5.1.3.2.8 All Offer Adjustments Four types of manual adjustments can be made:

- Decrease Committed
- Decrease Committed and Utilized
- Decrease Utilized
- Increase Utilized

The following is an example of a manual adjustment. A lump sum offer for \$10,000 was given to a customer for displaying in-store advertisements. Budget Utilized was increased by \$10,000 at the time the offer started. Later, the company realizes the customer fails to meet the requirements of an offer, a user therefore decreases the Utilized amount for this offer.

Rules for adjusting budgets are as follows:

- You cannot cancel a budget to which you have an approved campaign tied. You must first cancel all associated campaigns, and then cancel the budget.
- If you cancel a budget with existing campaign activities in the approval process, the system sends an alert to the campaign owner stating that the campaign must either be cancelled, or funded by an alternate budget.
- If an adjustment reference includes a product, the system posts the full adjustment against the specified product.
- If the adjustment references a campaign and offer, the system applies the adjustment amount equally among all products in the offer.

In addition, the following automatic adjustments are made in the Budget module:

- Recalculated Committed Increase
- Recalculated Committed Decrease
- Volume Offer Adjustment Increase
- Volume Offer Adjustment Decrease
- Scan Data Offer Committed Increase
- Scan Data Offer Utilized Increase

5.1.3.3 Budget Tracking

The topics presented in this section include:

- [Section 5.1.3.3.1, "Buckets"](#)
- [Section 5.1.3.3.2, "Utilized Column"](#)
- [Section 5.1.3.3.3, "Paid Column"](#)
- [Section 5.1.3.3.4, "Campaign Checkbook"](#)
- [Section 5.1.3.3.5, "Offer Checkbook"](#)
- [Section 5.1.3.3.6, "Customer Checkbook"](#)

- [Section 5.1.3.3.7, "Rollup View"](#)

5.1.3.3.1 Buckets The buckets used in the Budget module to track different amounts are listed and described in the table below.

Table 5–4 Buckets in the Budget module

Column Name	Description
Total	Total budget amount.
Transferred In	Amount transferred into the budget. It is added to Total.
Transferred Out	Amount transferred out to another budget. It is subtracted from Total.
Holdback	Amount held in reserve.
Available	Total — holdback.
Planned	Total amount of budget requests not yet approved.
Committed	Total amount of budget requests approved.
Balance	Available — committed.
Re-calculated Committed	The amount of commitment calculated based on actual utilization. If re-calculated committed is implemented, the amount here is the actual committed amount.
Utilized	Amount that has been utilized or earned.
Paid	Amount that has been paid.

5.1.3.3.2 Utilized Column The Utilized column records most of the budget integration to sales orders, regardless of the order channel. This column is also called Earned. A few types of records are stored in this column as follows:

- Utilization
 - Costs from the marketing activities, when posted here, are called utilization
 - Off invoice offers
- Accrual (created from offers)
- Adjustment (created in the Budget Checkbook)

5.1.3.3.3 Paid Column The Paid column records all of the payment information of the budget by:

- Off invoice offers
- Claims – settled through credit memo or checks
- Deductions – settled through credit memo

5.1.3.3.4 Campaign Checkbook The campaign checkbook summarizes the main budget buckets by campaign. Users can get to a campaign checkbook by drilling down into the Committed column and then again drilling down into the campaign itself.

5.1.3.3.5 Offer Checkbook The offer checkbook summarizes the main budget buckets by offer. Users can get to an offer checkbook by drilling down into the Committed column and then again drilling down into the offer itself.

5.1.3.3.6 Customer Checkbook The customer checkbook summarizes the main budget buckets by customer. To view a customer checkbook, navigate to the Customer Budget View. Depending upon your responsibility, you will see all customer budget views or only the customers who belong to the budgets you own.

5.1.3.3.7 Rollup View A Budget rollup view displays the sum of its own numbers plus the numbers of its descendent budget.

For example, there is a three level budget hierarchy comprised of USA (level 1) Western Region (level 2) and California (level 3). If the California budget has committed \$10,000, the Western Region budget on its own has committed \$5,000, and the USA budget on its own has committed \$3,000, then the rollup view for the USA budget committed funds is $\$10,000 + \$5,000 + \$3,000 = \$18,000$.

The rollup view of the Western Region budget committed funds is $\$10,000 + \$5,000 = \$15,000$.

The rollup view of the California budget committed funds is \$10,000.

A budget self view means that it will only show the transactions and activities that the budget itself directly funds. In the above example, the budget self view for the California budget committed is the same as its rollup view, that is \$10,000. The budget self view for the Western Region budget committed is \$5,000. The budget self view for the USA budget committed is \$3,000.

Each user in a budget hierarchy can see a real time, rollup view based on his user profile currency. For example, a manager in Canada may prefer seeing rollup view

in CAD. His budget parent is owned by a US manager who prefers seeing the rollup view in USD. Each manager is able to see the rollup view in the currency he prefers.

5.1.3.4 Budget Administration

The topics presented in this section include:

- [Section 5.1.3.4.1, "Budget Statuses"](#)
- [Section 5.1.3.4.2, "User Statuses"](#)
- [Section 5.1.3.4.3, "Budget Thresholds"](#)
- [Section 5.1.3.4.4, "Budget Delete"](#)
- [Section 5.1.3.4.5, "Copy Budget"](#)

For information on system parameters, custom setup, mandatory rules, locking rules, approval rules, budget security, and budget categories, see the *Oracle Marketing Implementation Guide*.

5.1.3.4.1 Budget Statuses The following table lists and describes the budget statuses used in Trade Management.

Table 5–5 Budget Statuses

Budget Status	Description
Draft	Can be updated at any time. Status can be changed to: ■ Pending Approval or Cancelled ■ Active if the budget owner also owns the parent budget, and the parent budget status is Active.
Pending Approval	The budget has been submitted for and is awaiting approval. Once approved, the budget status can be Active or On Hold. If rejected, the status is changed to Rejected.
On Hold	An interim status used when a budget has been approved, but is not ready for use. The status can be manually changed to Active or Closed.
Rejected	The budget was rejected. The status can be manually changed to Draft.

Table 5–5 Budget Statuses

Budget Status	Description
Active	The budget is approved and is ready to fund various activities and promotions. The status can be changed to Closed or Cancelled.
Cancelled	The budget has been aborted. The status can be changed to Archived.
Archived	The budget can no longer be used and the status cannot be changed.
Closed	The budget period has ended. It is no longer available to fund activities and offers.

5.1.3.4.2 User Statuses User statuses are as follows:

- Draft — First Reviewer
- Draft — Second Reviewer
- Draft — Third Reviewer
- Draft — Final Reviewer

Example of user status usage

A team of finance people are administering a budget. They must all review the budget before submitting it for approval.

The first reviewer looks at the budget, and puts it in Draft – First Reviewer status. At this user status, the budget has all the behavior of a draft budget, that is all of the fields can be updated, but funds cannot yet be withdrawn. Assigning the budget this user status serves the purpose of letting everyone on the team know that the budget is under the first review. When the first reviewer finishes, he can change the status to Draft – Second Reviewer. This change lets the team know that the First Reviewer is finished, and the Second Reviewer should now review the budget.

5.1.3.4.3 Budget Thresholds Setting a threshold on a budget helps you monitor budget activities. You receive an alert when the threshold you have set is met.**Example**

If the duration of a budget is one year, you could set a threshold for the first quarter and ask to be notified when actual budget utilization is > 25% of the committed

amount. During the second quarter, you may want to be alerted if utilization is > 50% of the committed amount.

A threshold could be created with the name "Quarterly Budget Alert for 2003"> it could have 4 lines, one for each quarter. Each line could have a different condition and frequency by which the notifications would be sent.

5.1.3.4.4 Budget Delete Budgets with a status of Draft, Cancelled or Archived can be deleted. Deleted budgets are no longer available through the user interface.

5.1.3.4.5 Copy Budget You can create a new budget by copying information from an old budget. An example of when you may to do this would when creating a yearly budget that repeats the same essential information each year.

5.1.4 Trade Management Claims Overview

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

Trade Management claims functionality aims to help companies solve these problems. Claims assignment functions provide flexible rules with multiple attributes to find the right claim owner through Territory Management. A Claims API also allows customers to more flexibly assign claims based on any information. Claims administration tools include claim types and reasons which allow users to bucket claims for analysis purpose so that companies can correctly identify their most problematic areas. Claim splitting lets users divide a claim into smaller pieces due to different reasons for accurate tracking, and notes, attachments and claim history tracking record every change made to a claim as well as all supporting documentation.

Claims reporting tools include a comprehensive aging report, personalized searches which allow users to sort and group all claims by customers, sales representative, size, reason, type, and other claim details.

In claims settlement, Trade Management offers out of the box, robust integration with Oracle Receivables. Auto-Resolution functionality significantly reduces settlement time. The Claims module also provides research and validation tools to

monitor performance and facilitate quick claim resolution. Claims personnel now have real-time access to customer promotional deal information along with accrual details through the budget checkbook. Claims personnel can have quick access to discount, order, and invoice information for a particular customer via seamless integration with Oracle Order Management, Oracle Advanced Pricing, and Oracle Receivables.

More settlement features include “Autopay” which periodically pays customers based on their accruals without them having to submit requests or taking a deduction, and “Pay Related Customers” which leverages on Oracle’s Trading Community Architecture to pay a customer’s related accounts including the support of buying groups.

This section contains the following topics:

- [Section 5.1.4.1, "Claim Creation"](#)
- [Section 5.1.4.2, "Claim Assignment and Security"](#)
- [Section 5.1.4.3, "Claim Research"](#)
- [Section 5.1.4.4, "Claim Maintenance"](#)
- [Section 5.1.4.5, "Claim Settlement"](#)
- [Section 5.1.4.6, "Claim Reporting"](#)

5.1.4.1 Claim Creation

Claims can be created in Trade Management based on the request from customer to reimburse or credit their expense on a product or service. Both promotional and non-promotional claims are supported in this release. A claim can belong to one of four categories: Claim, Debit Claim, Deduction and Overpayment. Trade Management provides ways to create each category of claims differently.

The Claim Creation page allows user to create a single claim or debit claim. To expedite the process, claim mass creation enables users to create as many claims as they want with a single click. Claim Import can be used to create a claim based on legacy data. The Claim Autopay program provides users with the ability to automatically create claims based on a threshold set up from customer accruals. This program can be modified by the user. In addition, a public API is provided to create claims from any system.

Deductions and Overpayments are created from Oracle Receivables. Oracle Receivables users can create deductions or overpayments when they find there is a mismatch between the applied transaction amount and receipt amount from

Receipt application window. If the payment is directly applied to a transaction and a short pay is recognized, a deduction can be created based on the transaction or a claim investigation can be created for the customer on the receipt. If Oracle Receivables users identify the customer is overpaying, a claim investigation can be created for the customer on receipt and will be distinguished as an overpayment claim class in Trade Management. All transaction and receipt information from Oracle Receivables is carried over to Trade Management as source information for claim research.

5.1.4.1.1 About Claims

Note: Throughout this document, the term claim is often used generically to encompass claims, deductions and overpayments.

The following four types of claims can be processed in Trade Management: Claim, Debit Claim, Overpayment, and Deduction (transaction and non transaction-related). Deductions and overpayments are created in Oracle Receivables, while claims and debit claims are created directly in Trade Management.

When a claim is created, all of the information necessary to process the claim is captured including the claim type, reason for the claim, pertinent customer information, contact information, broker and sales representative details, the amount, currency type, and so on. If the currency of the claim differs from the currency used by your organization to post accounting entries, Trade Management can convert the claim amount to the proper currency.

Trade Management also supports payment to:

- Related customer accounts, allowing you to issue payment directly to the claiming customer or to one of its related accounts. For example, you may have a customer whose accruals are tracked on the bill-to account level. This customer submits a claim, but requests payment be sent directly to one of its related ship-to accounts.
- Buying groups and its members. Buying groups are formed when organizations group themselves into a larger entity. This functionality can be used as follows. Your organization creates a promotion for buying groups. As orders are placed by the buying group members, the accruals for each member are tracked individually, even though the buying group entity may be handling all of the invoices and claims for the group. When settling claims for this promotion, you

can view the buying group member accruals and decide whether to issue payment to the buying group, or directly to one of its members.

Claims are created in Trade Management to handle reimbursement requests from customers for a variety of reasons. These reasons can include reimbursement for the return of damaged goods, or reimbursement for services the customer has performed as part of an offer.

Claims may or may not be promotion-related. Promotion-related claims have promotional earnings (accruals) associated with them which can viewed by opening the Associate Earnings page.

The claim settlement methods available in Trade Management include issuing a check, a credit memo, or a Return Materials Authorization (RMA). RMAs create credit memos.

Debit Claims are created in Trade Management. You can use debit claims to charge back customers who were ultimately paid too much.

For example, you might have a customer who earns \$10,000 and is issued a check for that amount. Later on, this same customer returns \$1,000 worth of merchandise from a previous order, thus decreasing their true accrual to \$9,000. To handle this situation, you can create a debit claim for < \$1,000), and generate a debit memo as the settlement type.

Deductions are created in Oracle Receivables and can be settled in Trade Management. Deductions are used to handle situations where customers deduct money from their payments for various reasons. These reasons include deductions for shipping errors, pricing errors, and promotional earnings. When a deduction is created, all of the pertinent information entered in Oracle Receivables is available in Trade Management including receipt numbers, dates and amounts; customer and transaction information; customer debit memo numbers; and claim reasons.

For example, Customer A is sent an invoice for \$10,000. However, Customer A remits only \$8,000 for this same invoice, citing a deduction of \$2,000 for promotional earnings not yet received. To handle this situation, you can create a deduction in Oracle Receivables, and settle it in Trade Management by issuing an invoice credit.

Deductions can be:

- Transaction-related—they can be traced back to a specific transaction such as an invoice, debit memo or chargeback.
- Non transaction-related—they cannot be traced back to a specific transaction.
- Promotion-related—they have promotional earnings associated with them.

The methods available in Trade Management for settling deductions are listed and defined below.

- *Invoice credit memos* are used to generate invoice credit memos that reduce a customer's invoice balance to settle a valid deduction.
- *On account credit memos* are used to reduce a customer's balance to settle a valid deduction.
- *Previous on account credit memos* are existing on account credit memos in Oracle Receivables that are still open. You may be able to use open on account credit memos to reduce a customer's balance and settle a valid deduction.
- *Write offs* are used to settle valid deductions that are so small it is not worth the time and resources to research them. In these cases, your company is absorbing the deduction as an expense.
- *Chargebacks* are used to charge customers back for invalid deductions.
- *RMAs* are used to handle valid product returns in cases where an RMA has not yet been created. An RMA created in Trade Management results in the generation of a credit memo to settle the deduction.
- *Contra charges* are used to settle valid deductions by customers who are also vendors. Contra charges adjust a customer's balance in both Oracle Receivables and Oracle Payables.

For more information on these transaction types and adjustments, refer to your Oracle Receivables and Oracle Order Management documentation.

Overpayments are created in Oracle Receivables when customers overpay what they owe your company. You can settle overpayments in Trade Management using the following methods:

- *Debit memos* can be used to balance the accounts of customers who pay back credits they have received in error. For example, Customer B submits an invalid claim. Due to an error, they receive credit for that claim. Later, Customer B decides to pay the money back, thus creating an overpayment claim in Oracle Receivables which can be settled in Trade Management by issuing a debit memo.
- *Write offs* can be used to settle valid deductions that are so small it is not worth the time and resources to research them. In these cases, your company is absorbing the deduction as an expense.

- *On account credits* can be used to apply erroneous customer overpayments back to the customer's account. This credit can be applied to future customer invoices.

5.1.4.1.2 About Claim Types and Reasons When creating a claim, you must select a claim type and reason. Claim types and reasons are used to classify claims, to integrate claim processing and settlement between Oracle Receivables, Oracle Order Management, and Oracle General Ledger, and to allow businesses to analyze their claim problems.

Classification. Selecting a claim type and reason classifies the claim. For example, you might have a claim type called Lump Sum Payment and a reason called Product Returns. This claim type and reason could be assigned to all claims from customers who have returned product and are requesting a lump sum payment such as reimbursement for these goods.

Integration with Oracle Receivables, Oracle Order Management and Oracle General Ledger. If Trade Management is fully integrated with Oracle Receivables, Oracle Order Management and Oracle General Ledger, the claim type and reason facilitates the processing and settlement of claims between these applications.

Analysis. Claim types and reasons allows you to distinctly group your claims and identify problem areas that need improvement. For example, you might have a large number of claims with the type shipping and the reason damaged goods. With this knowledge, you can improve your shipping methods and reduce the number of shipping claims due to damaged goods.

Claim types and reasons are set up by your system administrator based on your particular business needs. For more information on creating claim types and reasons, and on application integration, see the *Oracle Marketing Implementation Guide*.

5.1.4.1.3 About Actions As an option, you can select an action when creating a claim. Each action typically has a series of tasks associated with it that help guide you and anyone else involved through the research and settlement process for a particular claim.

For example, a shipping claim may have an action called Shipping Claim Tasks. The series of tasks might include:

1. Review invoices for shipped products and amounts.
2. Contact shipping department for verification.
3. Obtain proof of delivery.

And so on. Actions are set up by your system administrator based on your particular business needs. For more information on actions, see the *Oracle Marketing Implementation Guide*.

5.1.4.1.4 About Mass Creating Claims and Debit Claims Trade Management provides you with the ability to quickly create multiple claims and debit claims on one screen. If you have a high volume of similar claims or debit claims, this functionality can expedite the claims process.

5.1.4.1.5 About Autopay Autopay allows you to automate check or credit payments for promotional accruals to your customers, including related customer accounts and buying groups.

Deductions on payments are often taken by customers because they do not receive promotional earnings checks fast enough. By utilizing autopay, you can improve the regularity by which your customers receive accrual payments, thus reducing the number of deductions you receive. Autopay automatically creates the claim, associates the claim with the customer's accruals, and settles the claim as designated by issuing a credit memo or check.

For example, you set up autopay to issue a credit memo for promotional accruals to Customer 155 every two weeks. Every two weeks, autopay looks at Customer 155's accrual balance. For this two week period, let us say the balance is \$100,000 utilized and \$80,000 paid, leaving an outstanding balance of \$20,000.

Autopay automatically creates a claim for Customer 155, associates it with the \$20,000 accrual balance, selects credit memo as the settlement method, and initiates the settlement process. The settlement process begins with claim approval and ends with the generation of a credit memo for \$20,000 and closure of the claim. Because Customer 155 knows they are issued a credit memo every two weeks, it is less likely they will deduct accruals from payments to your company.

5.1.4.2 Claim Assignment and Security

Assigning proper owners to claims is a first and important step in claim resolution. With responsibility clearly defined, companies can hold different internal parties accountable to resolve different claims and deductions.

The Trade Management Claims module supports the use of Territory Management to define territories to assign claim owners based on multiple customer, product, geographical attributes as well as claim type and reason. Trade Management also provides an assignment API to allow companies to customize the assignment of claim ownership any way they want.

Trade Management provides different level of access based on security group. Under this rule, the owner of the claim can change the all the fields including the Owner field. A member of the security group can update claim information except the owner. A non-member cannot update any field. An application profile option is also provided to disable this feature, if necessary.

5.1.4.2.1 Claim Ownership Every claim must have an owner. Owners are assigned manually or automatically when claims are created. Automatic assignment occurs if the Auto Assign Owner feature has been implemented by your organization.

Claims can be owned by one of the following:

- An individual.
- A team, where one team member is designated as the primary owner.
Teams can consist of multiple individuals and pre-defined groups of individuals.

Pre-defined groups must be set up by a system administrator in CRM Resource Manager. The automatic assignment of an individual or a team must be set up by a system administrator in CRM Territory Manager. For more information on CRM Resource Manager and Territory Manager, see the *Oracle Marketing Implementation Guide* and the *Oracle CRM Application Foundation Concepts and Procedures Guide*, release 11.5.6.

Even when a claim is owned by a team, one individual is always designated as the primary owner. That person's name appears in the Owner field on the Claim Detail page. The primary owner can:

- Add and remove team members.
- Reassign claim ownership to another individual.

Team members can access and update the claims to which they are assigned.

Team ownership allows you to manage scenarios where a specific claim owner is not easily determined at the time of claim creation. Collective ownership and collaborative investigation may be required. Assigning a team to this type of claim may reduce claim settlement delays that could occur if the wrong owner were assigned. For example, a claim might sit in the wrong owner's queue for a lengthy period of time before it is reassigned to the proper owner. Team assignment also reduces the need for creating many complex territories to handle every business scenario. The following is a sample business scenario.

Based on the customer's address, Company XYZ knows that Claim #1020 should be assigned to a service representative (rep) in their California territory. However,

there is not enough information available to select a specific representative. The claim is therefore assigned to a team of reps in the California territory. When the reps see the claim, one of them recognizes that it is his responsibility and takes ownership of the claim.

Refer to the following procedures for more information on:

- [Section 5.2.4.6, "Reassigning Claim Owners Using Auto Assign Owner"](#)
- [Section 5.2.4.7, "Adding Members to a Team"](#)

5.1.4.3 Claim Research

Trade Management provides users with many ways to update claim information and facilitate the research necessary to resolve a claim. There are various tools to allow users to extract all information regarding customers, transactions (invoices, credit memos, debit memos, checks, chargebacks, payments, etc.) and promotional accruals tracked in Trade Management's Budgets module. Such tools include Discoverer for both querying and providing users with pre-built reports and associate earnings.

Tasks functionality provide claims users with a project management tool to coordinate different action items required to be performed by various users/teams. The resolution of a claim may involve different employees in different internal departments. For example, a shipping related claim may need the help of a shipping clerk, a pricing error may involve response from a sales representative. This tool can guide the research process along by tracking progress and status of different tasks.

Note: Once a claim is split, the parent and the child claim are totally separate from each other during claim search. However the amount of a child claim cannot be modified.

The topics presented in this section include:

- [Section 5.1.4.3.1, "Claim Details"](#)
- [Section 5.1.4.3.2, "Customer 360 View"](#)
- [Section 5.1.4.3.3, "Oracle Discoverer"](#)
- [Section 5.1.4.3.4, "Associated Earnings"](#)
- [Section 5.1.4.3.5, "Splitting Claims"](#)

- [Section 5.1.4.3.6, "Tasks"](#)
- [Section 5.1.4.3.7, "Notes and Attachments"](#)

5.1.4.3.1 Claim Details View the Claim Details page to see the following information:

- *Basic information* including the claim number, date, type, reason, action, owner and status.
- *Customer information* including the customer name, account number, bill to and ship to addresses, contact, broker, sales rep, reference (customer debit memo) and reference date.
- *Amount information* including the claim amount, in both functional currency and transaction currency, and exchange rate information.
- *Duplicate claim information* that consists of a list of claims that might be duplicates of the claim you are researching. If duplicate claims are discovered, you can mark them as such. Claims marked as duplicates are automatically closed.
- *Auto assign owner.* Selecting this check box instructs the system to reassign claim ownership based on modifications that have been made to the claim information.

To view claim details, navigate to Claim > Claims and select a claim number. For more information, refer to the procedures section of this chapter.

5.1.4.3.2 Customer 360 View A 360 view of a customer lists all of their transactions including all orders, invoices, debit memos and chargebacks. From this page, you can click the link for any of these transactions and view it in more detail. For example, if you click the link for an order, a page will appear that shows the order line information, prices, quantities and shipping details.

You can access the 360 view for all of your customers by navigating to Audience > Organization. For more information, refer to the procedures section of this chapter.

5.1.4.3.3 Oracle Discoverer Oracle Discoverer is a tool that can be opened from Trade Management. Depending upon how Discoverer is implemented for your organization, it can be used as either:

- A query tool that allows you to extract all customer or other information from the database by creating and using workbooks.
- A page with pre-defined reports that you select to run and refresh whenever the reports need to be updated.

For more information on working with Discoverer, refer to the procedures section of this chapter.

5.1.4.3.4 Associated Earnings Use the Associate Earnings page to see all of the outstanding (unpaid) promotional offer accruals related to a specific customer and claim. Using the search function, you can view all of the offers applicable to each claim for customers and related accounts, and buying groups and buying group members.

Some examples of how you can use associated earnings for claim research and settlement are given below. For each example, you can assume that the following has already occurred:

- A claim has been created.
- At least one claim line was created, and earnings were associated with it.

To access the Associate Earnings page, navigate to Claim > Claims> [Claim Number] > Lines, then click the appropriate check mark in the Associate Earnings column.

Example 1 —Accruals

Customer XYZ submits a deduction for \$20,000. First, you look at this customer’s checkbook and see the following:

Offer	Utilized	Paid
Offer 1	\$100K	\$40K
Offer 2	\$15K	\$9K
Offer 3	\$8K	\$3K

Next, you look at their associated earnings information for this claim and see the following.

Offer	Amount	Amount Available
Offer 1	\$100K	\$60K
Offer 2	\$15K	\$6K
Offer 3	\$8K	\$5K

Let us assume that you have determined the deduction is related to all three offers, and you have selected credit memo as the settlement method. In the Line Amount

fields on the Associate Earnings page, you might enter the values shown in the Line Amount column below:

Offer	Amount	Amount Available	Line Amount
Offer 1	\$100K	\$60K	\$9K
Offer 2	\$15K	\$6K	\$6K
Offer 3	\$8K	\$5K	\$5K

When the credit memo is issued, \$9K is withdrawn from the accruals for Offer 1, \$6K from Offer 2, and \$5K from Offer 3. The following GL accounting entries are created:

Debit Liabilities (Offer 1) \$9K
Credit Receivables Clearing (Offer 1) \$9K

Debit Liabilities (Offer 2) \$6K
Credit Receivables Clearing (Offer 2) \$6K

Debit Liabilities (Offer 3) \$5K
Credit Receivables Clearing (Offer 3) \$5K

Customer XYZ's budget checkbook is updated automatically to:

Offer	Utilized	Paid
Offer 1	\$100K	\$49K
Offer 2	\$15K	\$15K
Offer 3	\$8K	\$8K

When the next claim for this customer is created, the associated earnings page would show:

Offer	Amount	Amount Available
Offer 1	\$100K	\$51K

Example 2- Buying Group

Buying Group X offers all of its members a deal whereby each unit of product purchased is eligible for a 10% accrual. Member A places an order and accrues \$10K. The \$10K is tracked in the utilized column of the budget for Member A.

Buying Group X handles the invoicing and claim processing for all of its members. It submits a claim on behalf of Member A for \$10K. As the claim owner, you create a claim with at least one claim line, and associate earnings with that claim line.

When you view the Associate Earnings page, you do not at first see the \$10K in accruals because Buying Group X did not place the order directly. To research this claim further, you use the search function to view all of the accruals for all of the buying group members.

You can now associate the \$10K in accruals to the claim and pay either Member A directly or Buying Group X, who will disburse the payment to its Member A.

5.1.4.3.5 Splitting Claims To facilitate the research and settlement of a claim, you might want to split it into multiple, smaller claims. Split claims share the same master claim number, with the addition of a suffix as an identifier. When a claim is split, you can see a running total of the amount assigned to the new claims as well as a balance. If the entire amount of the claim is not allocated to the split claims, the unassigned balance remains on the original claim. Some of the cases where splitting a claim might be useful are listed below.

- To settle part of a claim only

For example, at year end you have a \$10K claim, but you can validate only \$5K. You split this claim into two claims, validate and settle one of them, and keep the remaining claim open for further investigation.

- To facilitate the investigation of a claim caused by multiple reasons

For example, a customer might submit a claim for \$100K that is based on an audit of their records. After some investigation, you determine it comprises three earlier claims that the customer believes they never received payment for. To facilitate investigation of the claim, you split it into three claims, allowing you to investigate each reason separately.

- Only part of a claim is valid

When only part of a claim is valid, you can split the claim and settle the part you have verified. The other part of the claim might be left open for further investigation, or it might be charged back to the customer.

For example, a customer might submit a claim for a short shipment and a promotional discount. The promotional discount part is valid, but the short shipment part requires further investigation. You can split the claim into two, and settle the one for the promotional discount, while leaving the other claim open for further investigation.

The following example shows in more detail how a claim with multiple reasons might be split.

The customer's invoices total \$100K. You receive a check for \$20K that includes an \$80K deduction. No reason is given for the deduction, so you create a deduction in Oracle Receivables using the default reason of Unknown.

After some investigation, you determine that the customer deducted \$30K for promotions, \$40K due to shipping errors, and \$10K due to pricing errors. You might decide to split the claim one of two ways:

Deduction Number	Status	Amount	Reason
DED1	Cancelled	\$0K	Unknown
DED1_1	Open	\$30K	Promotions
DED1_2	Open	\$40K	Shipping Errors
DED1_3	Open	\$10K	Pricing Errors

Deduction Number	Status	Amount	Reason
DED1	Open	\$30K	Promotions
DED1_1	Open	\$40K	Shipping Errors
DED1_2	Open	\$10K	Pricing Errors

Notice that each claim number includes the original number of DED1. Oracle Receivables uses the original claim number for tracking purposes, while Trade Management tracks all outstanding balances and amounts processed for the root claim and each of the split claims.

For information on handling claim lines when splitting a claim, see [Section 5.2.4.17, "Splitting Claims"](#).

5.1.4.3.6 Tasks In Trade Management, you can create, assign and manage tasks that help coordinate the various activities required to resolve and settle a claim. Tasks can be assigned to individuals or teams, which the help of coworkers from different departments is required. For example, to verify a shipping-related claim, you may need the assistance of your shipping clerk. To verify a pricing error claim, you might need to involve the sales rep. As such you could create and assign various tasks to this individual. For more information on tasks, see [Section 5.1.4.4, "Claim Maintenance"](#) below and [Section 5.2.4.14, "Creating Tasks"](#).

5.1.4.3.7 Notes and Attachments Trade Management allows you to fully document claim research and settlement by including notes and attachments. For example, you may have a telephone conversation with a customer's contact about a particular claim. You can record the details of the conversation in a note that is part of the claim.

Another example would be a situation where a customer's claim for a front-aisle lump sum promotion cannot be paid until the customer provides proof of compliance. The customer might submit photographs as proof that the products were displayed on the front aisle for the required amount of time. If the photographs are electronic files, you can add them as attachments to the claim.

5.1.4.4 Claim Maintenance

For deductions and overpayments that are created from Oracle Receivables, a Source page is provided. User can browse the payment and invoice information related this claim.

Claim History functionality is provided for a user to search for all actions applied to a claim. A snapshot of claim and its claim lines is taken before the action took place. Claim history begins when the claim status is updated to Open. A History creation rules page is provided for use to setup the update events that will trigger a history recording.

Tasks are generated based on actions. Once an action is decided on a claim, the list of tasks associated with this action is linked to this claim. Users can track the progress of the task by following the task side navigation links. When the action changes, all incomplete tasks are removed from task list and set of new tasks is created. All completed tasks are linked to the claim history record. Action and task association is defined on the Administration page.

5.1.4.4.1 Related Documents The Related Documents side navigation link enables user to automatically search for related claims 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.

5.1.4.5 Claim Settlement

The Claims module provides settlement functions that automate a majority of claim and deduction scenarios. For a claim created in Trade Management, checks and credit memos can be automatically created in the Oracle Payables and Receivables systems respectively for settlement. For a deduction or an overpayment created from the Oracle Receivables system, many settlement methods are supported. This is known as Auto-Resolution.

With Auto-Resolution, companies can automatically close out deductions, create corresponding Receivables transactions, apply the transactions, and enter accurate accounting entries as soon as a Trade Management claims user settles a deduction. With the support of the Oracle Trading Community Architecture, the Claims module provides for paying out related customers and buying groups. Buying groups are formed when multiple companies are grouped together to increase their buying power with a manufacturer.

5.1.4.5.1 Scan Data Offers and Automatic Adjustments to Committed and Utilized Because actual scan data is entered through claims, the claims module is critical in managing the payment of scan data offers. When actuals exceed the forecast values for these offers, a claim triggers the automatic adjustment of the scan data accruals, including the committed and utilized values as necessary. The following examples illustrate these types of adjustments.

Example 1 - Adjustments to Committed and Utilized

For this example, we will assume a scan data offer was created for BBB Co. as follows:

Product	Forecast Total Scan Value
Product A	\$100K
Product B	\$80K

The committed amount for this offer was \$180K. At the time the offer is created, the following accounting entries are made:

Debit Sales or Expense (Product A) \$100K
Credit Liabilities (Product A) \$100K

Debit Sales or Expense (Product B) \$80K
Credit Liabilities (Product B) \$80K

The Offer Checkbook looks as follows:

Committed	Utilized	Paid
\$180K	\$180K	\$0K

When the actual data are submitted, you create a claim with at least one claim line. You associate the earnings from the claim line to the scan data offer, and enter the actual data in the appropriate scan data offer field.

For this claim, the calculation of actuals (actual units and value) is:

Product	Forecast Total Scan Value	Actual Total Scan Value
Product A	\$100K	\$120K
Product B	\$80K	\$90K

These numbers represent a \$30K increase to both the committed and utilized amounts. For the increase in the utilized amount, the following GL entries are created:

Debit Sales or Expenses (Product A) \$20K
Credit Liabilities (Product A) \$20K

Debit Sales or Expenses (Product B) \$10K
Credit Liabilities (Product B) \$10K

When the claim is settled, automatic adjustments are made to the committed and utilized amounts. The offer checkbook now looks like this:

Committed	Utilized	Paid
\$210K	\$210K	\$210K

Example 2 - Adjustments to Utilized Only

For this example, we will assume the following scan data offer has been created:

Product	Forecast Total Scan Value
Product A	\$100K
Product B	\$80K

The committed amount for this offer was \$200K. The Offer Checkbook looks as follows:

Committed	Utilized	Paid
\$200K	\$180K	\$0K

When actual data are submitted, you enter the data in a claim. The calculation of actuals based on actual units and value is:

Product	Forecast Total Scan Value	Actual Total Scan Value
Product A	\$100K	\$110K
Product B	\$80K	\$85K

This data represents no change in the committed amount, and an increase of the utilized amount by \$15K. GL postings are created for the \$15K. When the claim is settled, an automatic adjustment is made to the utilized amount, and the Offer Checkbook now looks like this:

Committed	Utilized	Paid
\$200K	\$195K	\$195K

Example 3 - Scan Data Offer with No Adjustments

This example shows what occurs when a scan data offer is under utilized. When a claim is created, no adjustments are made to its committed and utilized amounts. Adjustments are not automatically made to decrease the committed and utilized amounts so that more data may be submitted at a later date.

In cases where there is true under utilization, adjustments are made only if management determines that no more actual data is expected and closes the offer. If this occurs, a reconciliation can be performed. Refer to the Budget Reconciliation section for more information.

For this example, we will assume the following scan data offer has been created:

Product	Forecast Total Scan Value
Product A	\$100K
Product B	\$80K

The committed amount for this offer was \$200K. The Offer Checkbook looks as follows:

Committed	Utilized	Paid
\$200K	\$180K	\$0K

When actual data are submitted, you enter the data in a claim. The calculation of actuals based on actual units and value is:

Product	Forecast Total Scan Value	Actual Total Scan Value
Product A	\$100K	\$70K
Product B	\$80K	\$40K

This data represents no change to the committed and utilized amounts. No GL entries are created because no adjustments are required. When the claim is settled, the Offer Checkbook looks like this:

Committed	Utilized	Paid
\$200K	\$180K	\$110K

5.1.4.5.2 Splitting Claims See [Section 5.1.4.3.5, "Splitting Claims"](#).

5.1.4.6 Claim Reporting

Claim Reporting includes:

- *Claims Report* — a one page summary of essential claim details that can be printed without having to navigate to different screens.
- *Aging View* — a summary of claims and deductions by customer and by days due. It conforms to the bucket definitions in Oracle Receivables, but centralizes all claims and deductions by customer for easy viewing. From this view, you can determine which customer has had outstanding claims for the longest period time and work on those claims. Aging buckets can also be configured in Oracle Receivables for claim and deduction purposes.
- *Oracle Discoverer* — can be used as a reporting tool. Reports can be pre-built and will update in real time.
- *Personalized Summary View* — a function on the Claims Summary page that allows you to create custom searches for viewing lists of claims.

5.1.4.7 Third-Party Accruals and Pricing Simulations

Manufacturers often deal with their customers directly and/or indirectly through distributors. If this is the case with your organization, you may want to offer promotions to customers both directly and through distributors who also sell to the same customers. Trade Management can take indirect purchase data for direct customers, run a pricing simulation, and determine what promotions the customer is entitled to.

For example, let us say that your organization sells directly to Customer X. You also sell to a distributor who sells to Customer X as well as to other customers that you do not deal with directly.

The distributor periodically sends in sales data to help you calculate accruals for all of the customers. For this example, let us say the data consists of the following:

Customer	Sales Relationship to Your Organization	Sales Amount
X	Direct and indirect	\$100K
Y	Indirect only	\$80K
Z	Indirect only	\$70K

Based on the information provided from the distributor including the data, customer and product information, order number and date, quantity, price, shipment date, invoice number and date, and so on, Trade Management simulates the price and promotion that Customer X would have received had they dealt directly with you for a particular order.

If the pricing simulation indicates the customer would have received a better price or promotion dealing directly with you (say a \$10K difference for this example), Trade Management automatically creates an accrual for this customer. The \$10K is tracked in the customer budget, and can be paid later to the customer by a claim or deduction.

The data for Customers Y and Z will be saved and stored separately, so that you can offer promotions to these indirect customers in the future.

5.1.4.8 Chargeback

Chargeback functionality enables customers to generate accruals on the orders that they made through third-party wholesalers. It is a set of public APIs that simulate the pricing of the orders and then create 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 as well.

5.1.4.9 Claim and Deduction Statuses and Status Transitions

The tables below show the statuses and transitions for Claims and Deductions.

Table 5–6 Claim and Debit Claim Statuses

Status	Description	Possible Transition Status	Allowable Next Status
New	Initial creation of a claim.	N/A	■ Open ■ Rejected
Open	Status is changed from New status or Rejected status, indicating that the claim is under investigation.	N/A	■ Complete ■ Duplicate ■ Rejected ■ Closed
Complete	All claim information is validated and ready to submit for settlement.	■ Pending Close ■ Pending Approval	■ Open ■ Duplicate ■ Rejected ■ Closed
Pending Approval	An intermediate status to indicate that the claim is currently going through the approval process.	N/A	Approved
Approved	A status to indicate that claim was gone through the approval process and has been approved.	Pending Close	Closed
Pending Close	An intermediate status to indicate that the claim is in the payment creation process.	N/A	■ Closed ■ Open

Table 5–6 Claim and Debit Claim Statuses

Status	Description	Possible Transition Status	Allowable Next Status
Duplicate	The claim user may research a claim and find out that there is already an identical claim existing in the system. The claim user may select the duplicate claim number for the current claim as a reference and change the current claim status to Duplicate to stop any further research and settlement action. If any further research reveals that the current claim is not truly identical, the user may change the status from Duplicate to Open.	N/A	Open
Rejected	Claim has been rejected by an approver. Note: The claim user can change the status to Open later.	N/A	Open
Closed	This status indicates that the claim has been settled and all payments are created and populated into the settlement document. The user can review payment details from Settlement page	N/A	N/A

Table 5–7 Deduction and Overpayment Statuses

Status	Description	Possible Transition Status	Allowable Next Status
Open	Open is the original status when a deduction or overpayment is created from Oracle Receivables.	N/A	■ Complete ■ Closed
Complete	All claim information is validated and ready to submit for settlement.	■ Pending Close ■ Pending Approval	■ Open ■ Closed
Pending Approval	An intermediate status to indicate that the deduction or overpayment is currently going through the approval process.	N/A	Approved

Table 5–7 Deduction and Overpayment Statuses

Status	Description	Possible Transition Status	Allowable Next Status
Approved	A status to indicate that the deduction or overpayment has gone through the approval process and has been approved.	Pending Close	Closed
Cancelled	Cancelling a deduction or overpayment can only be accomplished through the Oracle Receivables application.	N/A	N/A
Pending Close	An intermediate status to indicate that the deduction or overpayment is in the payment creation process.	N/A	■ Closed ■ Open
Rejected	The deduction or overpayment has been rejected by an approver. Note: The user can change the status to Open later.	N/A	Open
Closed	This status indicates that the deduction or overpayment has been settled. All transactions are created in Oracle Receivables and receipt applications are done if necessary. All Receivable transaction information related to claim payment are populated into the settlement document in Trade Management. The user can review payment details from the Settlement page.	N/A	N/A

5.1.4.10 Clear Duplicate Claims

Users may perform searches for duplicate claims and deductions, based on reference numbers or names. Once located, you clear the claim as a duplicate and both the deduction and claim reference each other for future audits.

5.2 Trade Management User Procedures

This section contains the following topics:

- [Section 5.2.1, "Managing Trade Planning and Execution"](#)
- [Section 5.2.2, "Creating and Managing Forecasts"](#)
- [Section 5.2.3, "Creating and Managing Trade Management Budgets"](#)
- [Section 5.2.4, "Creating and Managing Claims"](#)

5.2.1 Managing Trade Planning and Execution

Topics included are:

- [Section 5.2.1.1, "Creating an Offer"](#)
- [Section 5.2.1.2, "Setting up Offer Qualifiers and Discount Rules"](#)
- [Section 5.2.1.4, "Setting Up Market Eligibility"](#)
- [Section 5.2.1.5, "Working with the Performance Requirements"](#)
- [Section 5.2.1.6, "Requesting Funding for an Offer"](#)
- [Section 5.2.1.7, "Offers Advanced Options"](#)
- [Section 5.2.1.8, "Searching and Viewing Offers"](#)
- [Section 5.2.1.9, "Creating Offer Adjustments"](#)

5.2.1.1 Creating an Offer

To create an offer, follow the steps below.

Prerequisites

To create an *active* offer, the funding source (budgets or a campaign) must exist. Otherwise, there are no prerequisites to begin working on an offer. When you are ready to activate the offer, you must select a funding source and change the offer status to Active.

Steps

Note: This procedure is written for the creation of accrual, off-invoice, and term upgrade offers. You can follow it for the basics of creating other offer types as well. [Table 5–8, "Other Offer Type Creation Conditions"](#) contains the specific information you need to know for creating other offer types.

1. Navigate to Product > Offers.
2. Click Create.
The Create Offer page appears.
3. Open the Setup Type drop-down list and select the type of offer you want to create.
The page will redraw and the fields may change depending upon the type of offer you selected.
4. In the Offer Name field, enter a unique name for the offer.
5. To select a customer:
 - a. Open the Customer drop-down list and select a market type.
 - b. Click the search icon for the second customer field, and select a specific customer, buying group, list, segment, or territory.
6. In the Offer Code field, enter a unique offer code, or leave the field blank. If left blank, a unique code is generated automatically.
7. If the customer must specifically state participation in the offer when submitting their order, then select the Request Only check box.
8. To select start and end dates for the offer, click the calendar icons and select dates.
9. In the Currency field, open the drop-down list and select a currency.
10. In the Discount Level field, open the drop-down list and select:
 - Line. Applies to the order line by order line.
 - Group of lines. Applies to a group of lines in the order.
 - Order. Applies to the invoice based on the entire order.

The offer type determines the choices you have for this field. For more information on the Discount Level, refer to your *Oracle Advanced Pricing User's Guide*.

11. In the Activity field, open the drop-down list and select the activity you want used to execute this offer.
12. If the funding source for this offer is an existing budget, you can select the budget now by clicking the search icon and selecting the budget name.

Note: Offers are sourced from a campaign or from multiple budgets. If you select a budget here, you can select additional budgets later from the Offer Details page by clicking Budget in the side navigation bar, entering an initial budget estimate, clicking Update, then clicking Create Request. See [Section 5.2.1.6, "Requesting Funding for an Offer"](#) for more information.

13. In the Committed Amount field, enter the amount you want to commit for the offer.
14. If the committed amount is the maximum amount allowed for this offer, select the Yes for Committed = Maximum.

When Yes is selected, Trade Management automatically passes the committed amount value to Advanced Pricing to ensure that the offer is limited to the committed amount.

15. In the Campaign field:

- a. To associate the offer with a campaign, click the search icon and select a campaign.

The offer does not have to source funds from the campaign you select here.

- b. To fund the offer from this campaign, select the Source From Campaign check box.

An offer can source funds from a campaign (ultimately the parent campaign) or from one or more budgets. For more details on the implication of sourcing from a campaign, see [Section 5.2.1.6, "Requesting Funding for an Offer"](#) below.

16. If the offer can be used for multiple campaigns, select the Reusable check box.

17. To keep the offer confidential until it becomes active, select the Confidential check box.

If selected, the offer is visible to the owner only until its status is changed to active.

18. To change the owner of the offer:
 - a. Delete the current name from the Owner field.
 - b. Click the search icon and select a new owner.
19. In the Description field, type in any additional information required for the offer.
20. Click Create.

As noted above, the steps in the preceding procedure are for creating accrual, off-invoice, and term upgrade offers. Use these steps and the conditions listed in [Table 5–8, "Other Offer Type Creation Conditions"](#) to create other offer types.

What you can do now

Once you have created an offer, you should do the following:

- Set up offer qualifiers and discount rules which determine the behavior of the offer. See [Section 5.2.1.2, "Setting up Offer Qualifiers and Discount Rules"](#).
- Specify who is eligible for the offer. See [Section 5.2.1.4, "Setting Up Market Eligibility"](#).
- Request funding for an offer if you have not already done so. An offer must have a funding source before you can activate it. See [Section 5.2.1.6, "Requesting Funding for an Offer"](#).

As an option, you might want to:

- Specify performance requirements for the offer. See [Section 5.2.1.5, "Working with the Performance Requirements"](#).
- Specify other advanced options for the offer including buckets, phases, incompatibility groups and exclusivity, print on invoice, and precedence. See [Section 5.2.1.7, "Offers Advanced Options"](#).

Table 5–8 Other Offer Type Creation Conditions

Offer Type	Requirements
Lumpsum	You must select a: ■ Customer. ■ Distribution Type: Select the distribution method from the drop-down list. What you select here determines how you might distribute the discount by line item on the Offer Details page. The Offer Details page appears after you click Create at the end of this procedure. ■ Lumpsum Amount: Type the actual dollar amount in this field. For example, if the lumpsum amount is \$100 and you select Percent as the distribution type, on the Offer Details page you might specify the following: Line 1 receives a 25% discount Line 2 receives a 50% discount Line 3 receives a 25% discount In addition, you can select a: ■ Payment Type: Open the drop-down list and select whether the earnings will be paid by issuing a check or whether they will be accrued.
Order Value	Discount Type. This field is mandatory. Open the drop-down list and select Percent or Terms Upgrade.
Promotional Goods	You can select a Break Type: Select Point or Recurring from the drop-down list. Point example: The offer condition is buy 10 units of product X and you will receive 1 unit of product Y. A customer buys 20 units of product X, but receives only one unit of product Y. Recurring example: The offer condition is buy 10 units of product X and you will receive 1 unit of product Y. A customer buys 20 units of product X, and receives two units of product Y.
Scan Data	All fields for creating this type of offer are described in the procedure above. Fields not displayed are not relevant to scan data offers.

Table 5–8 Other Offer Type Creation Conditions

Offer Type	Requirements
Volume Offer	■ Incentive. This field is mandatory. Open the drop-down list and select Off-invoice or Accrual. Off-invoice = the discount shows on the invoice. Accrual = the discount accrues and is not seen on the invoice. It is settled later through a claim. ■ Retroactive. You have the option of specifying whether the offer is retroactive. If selected, any past accruals are updated to the new rate once the new volume tier has been reached. A volume offer can also be set to accrual or off-invoice. The discount level is always set to the line level.
Trade Deal	You have the option of specifying a Customer Reference and Buyer Name for informational purposes only.

5.2.1.2 Setting up Offer Qualifiers and Discount Rules

Offer qualifiers and discount rules determine the behavior of the offer: what discounts to apply during what period of time. To specify who is eligible for the offer, refer to the instructions in [Section 5.2.1.4, "Setting Up Market Eligibility"](#).

Prerequisites

An offer must be created.

Steps for Accrual Offer Qualifiers and Discount Rules

Note: The following steps are written for accrual type offers. Use these instructions as a starting point for setting up qualifiers and discount rules for other offer types. See [Table 5–9, "Qualifier and Discount Rule Set Up for Non-accrual Offer Types"](#) for additional information specific to each offer type.

1. Navigate to Product > Offers.
2. Select the offer you want to work with.
The Offer Details page appears.
3. Scroll down to the Qualifiers section of the page. You have the option of specifying order, ship and performance dates by clicking the calendar icons and selecting dates.

- Order Dates: The time period during which orders must be received to be eligible for the offer.
- Ship Dates: The time period during which all eligible orders must be shipped.
- Performance Dates: The period of time during any performance requirements for the offer must be fulfilled.

For more information on performance requirements, see [Section 5.2.1.5, "Working with the Performance Requirements"](#).

4. To specify discount rules, scroll down to the Discount Rules section of the page and enter rules as follows for each line:
 - a. Open the Level drop-down list and select one of these product levels for the discount:
 - Item Number (a specific product)
 - Item Category (a product family such as batteries)
 - ALL_ITEMS (all products)
 - iStore Section (applicable only if your organization is using Oracle iStore).
 - b. In the Name column, click the search icon and select a value.

The list displayed is based on the value selected in the Level column (individual products, product families, iStore sections, or all).
 - c. In the UOM column, click the search icon and select a unit of measure for the product or products.
 - d. To select the tier type, open the drop-down list and select Single or Multiple.

If the multiple tier is chosen, the tier information is entered on another Offer Details. To access this page, you must complete this procedure, click Update, then click the icon that appears in the Details column.
 - e. To specify a Minimum Volume and Volume Type:
 - Type the minimum quantity that must be purchased to qualify for the offer in the Minimum Volume field column.
 - In the Volume Type column, open the drop down list and select Amount or Quantity.

The Volume Type selected qualifies the Minimum Volume. For example, if you entered 100 for the Minimum Volume and selected Quantity for the Volume Type, then the customer must purchase at least 100 units of the item (based on the UOM designated). If you selected Amount for the Volume Type, then the customer must purchase at least \$100 worth of the product.

- f. To specify a Discount and Discount Type:
- Type a numerical value in the Discount field.
 - In the Discount Type column, open the drop-down list and select the type of discount.

The Discount Type selected qualifies the Discount value. For example, if you entered a 5 for Discount, then the following would result for the various Discount Types you could select.

Amount = \$5.00 off the price per unit

Percent = 5% off the price per unit

Lumpsum = a flat \$5.00 off an order for that product regardless of quantity

New Price = the new price per unit becomes \$5.00

- g. In the Formula column, open the drop-down list and select a formula.
- For formulas to appear in the drop-down list, they must be created in Advanced Pricing. See the *Oracle Advanced Pricing User Guide* for more information.
- h. In the Active column, select the check box to make the line active for this offer.
5. To specify an initial estimated budget for the offer:
- a. Click Budget in the side navigation bar. The Offer Details - Budget Source page appears.
 - b. Enter an amount in the Initial Estimated Budget field.
 - c. Click Create Request.

Note: You cannot request approval for your offer until you have specified an initial estimated budget.

6. Do one of the following:

- Click Update to save your changes.
 - Click Request Approval. The Preview Approval page appears.
7. If you selected Request Approval, make sure the information on the Preview Approval page is correct, then click Confirm to forward the offer for approval.

What you can do now

If you have not already requested funding and specified who is eligible for the offer, you should:

- See [Section 5.2.1.4, "Setting Up Market Eligibility"](#).
- See [Section 5.2.1.6, "Requesting Funding for an Offer"](#). An offer must have a funding source before you can activate it.

As an option, you might want to:

- Enter additional details for any of the discount rules you created. These details are optional. They enable you to more precisely define the offer. See [Section 5.2.1.3, "Entering Discount Rule Details"](#).
- Specify performance requirements for the offer. See [Section 5.2.1.5, "Working with the Performance Requirements"](#).
- Specify other advanced options for the offer including buckets, phases, incompatibility groups and exclusivity, print on invoice, and precedence. See [Section 5.2.1.7, "Offers Advanced Options"](#).

Qualifier and Discount Rule Set Up for Non-accrual Offer Types

The table below is meant to be used as supplement with the procedure listed above, [Steps for Accrual Offer Qualifiers and Discount Rules](#). Use these steps and the table below when setting up qualifiers and discount rules for non-accrual type offers.

Table 5–9 Qualifier and Discount Rule Set Up for Non-accrual Offer Types

Offer Type	Differences
Off Invoice	■ Qualifiers and discount rules are the same. ■ Incentives are paid directly off the invoice as opposed to being accrued.
Trade Deal	■ Can have both accrual and off invoice components per line item. ■ Tiers are not supported.

Table 5–9 Qualifier and Discount Rule Set Up for Non-accrual Offer Types

Offer Type	Differences
Lumpsum	■ Each line item must have a discount value based on the distribution type (amount, percentage, or quantity). ■ If percentage is the distribution type, the total discount value (sum of all line items) must equal 100%. Otherwise, it must equal the total lumpsum amount.
Volume	Ranges can be in amount of quantity. Specify the unit of measure. ■ From – The minimum value required to qualify for a tier. ■ To – The maximum value allowed within a tier. ■ Discount – The corresponding discount or incentive that applies to values within the range of each tier. The value can be a percentage or an amount. Select the product or product category (can have products excluded from the discount) from the Product Profile table.

Table 5–9 Qualifier and Discount Rule Set Up for Non-accrual Offer Types

Offer Type	Differences
Scan Data	■ Level – Product or product family. ■ Name – Product or product family name. ■ UOM – Unit of measure. Available values are based on the item level and product name selected. ■ Scan Type – Select the values that represent the type of scan promotion vehicle utilized, for example, coupon or POS data feed. ■ Scan Value – Enter a value that corresponds with each item specified in the profile. ■ Scan Unit Forecast – enter one of the following values: <i>The amount of units that you anticipate will be sold during the offer. The value may be entered manually or may have values derived from the Offer Forecast function. This amount is editable while the offer status is Draft. Once the status is Active, the forecast cannot be changed.</i> <i>The amount of coupon or rebate units that could potentially be redeemed.</i> ■ Amount Value – The scan unit forecast multiplied by the scan values entered for each line item. This value is automatically calculated. ■ Adjustment – Check this box to allow auto-adjustments for over-utilization. This option is displayed only when the offer status is Draft or Planned. Once the status is Active, this column is not displayed at the Offer Details level. Adjustment is available for each line level identified in the Scan Data Profile table at the Offer Details level. Budget adjustments are made automatically for committed and utilized amounts at each line level indicated. ■ Once the actual consumption or redemption data has been entered through the Claims module, you will see the actual redemption from this UI.
Terms Upgrade	Select a term (freight, payment or shipping) to be upgraded to another term and its associated cost at the line level. Each line can be associated with a product category, product, an iStore selection, or to all products.
Promotional Goods	■ Select the products that must be purchased (level, name, minimum value or quantity). ■ Select the products that will be discounted (level, name, quantity, discount value and type).

Table 5–9 Qualifier and Discount Rule Set Up for Non-accrual Offer Types

Offer Type	Differences
Order Value	If the Discount Type is: ■ Percent, enter a percent. ■ Term Upgrade, enter a term upgrade (value and term type).

5.2.1.3 Entering Discount Rule Details

1. Navigate to Product > Offers.
2. Select the offer you want to work with.
The Offer Details page appears.
3. Scroll down to the Discount Rules section of the page.
4. For the line you want to work with, click the icon in the Details column.
5. Change any of these fields now as appropriate: UOM, Minimum Volume and Discount.

The offer type determines the fields that you will see.

6. In the Qualifiers section of this page, enter a minimum amount in the Order Value From field and a maximum amount in the Order Value To field.
Use these fields to specify the minimum and maximum dollar amount allowed per order for the offer.
7. Enter any discount rule product exclusions. The exclusions can be based on item, item category, or iStore section.

Note: The ability to enter product exclusions appears for certain offer types only, such as Trade Deals.

8. If you selected multiple tiers, define the tiers in the Offer Tiers section as follows:
 - a. Open the Volume Type drop-down list and change the value if desired.
 - b. Open the Price Break Type drop-down list and select a value.
 - Point = if the customer purchases a certain quantity, they will receive the full discount for all of the items purchased.

- Range = discounts are based on ranges. For example, there are two ranges: 5% off for the first 20 units of product B purchased; 10% off for 21 to 30 units. If the customer purchases 25 of product B, they will receive a 5% discount for 20 units of product B, and 10% off for 5 units product B.
 - Recurring = do not use this value.
- c. For each tier:
- Enter the minimum amount that must be ordered in the From column.
 - Enter the maximum amount for the tier in the To column.
 - Enter the discount that would be applied for that tier in the Discount column.
 - Open the Discount Type drop-down list and select the type of discount (Amount, Lumpsum, New Price, or Percent).
9. In the Maximum Caps section of the page:

Note: The Maximum Cap fields are described in more detail in [Table 5–10, "Maximum Caps"](#).

- a. In the Maximum Units Per Order field, enter the maximum number of units a customer can purchase per order.
 - b. In the Maximum Units Per Customer field, enter the maximum number of units a customer can purchase.
 - c. In the Maximum Orders Per Customer field, enter the maximum number of orders a customer can place for this offer.
 - d. In the Maximum Quantity Units (per discount rule) field, enter the maximum number of units available for this discount rule.
 - e. In the Maximum Committed Amount (Per Discount Rule) field, enter the maximum discount cost for this rule. For example, you might enter 50,000 to cap this offer once the discounts total \$50,000.
10. Click Update. A confirmation message is displayed.
11. Click Return to return to the Offer Details page.

Table 5–10 Maximum Caps

Field Name	Description
Maximum Units Per Order	■ Maximum number of units a customer can buy in one order. ■ Defined at the discount rule level ■ If the user has defined a discount rule on a product family, then the maximum units per order applies to the total number of units. Total number of units = all products in the product family, minus any excluded products. ■ You can modify this field in any state, except for Completed and Archived. ■ This field is optional. ■ Enforced in Advanced Pricing.
Maximum Units Per Customer	■ Maximum number of units a customer can buy. ■ Defined at the discount rule level. ■ If the user has defined a discount rule on a product family, then the maximum units per customer applies to the total number of units the customer can buy. Total number of units = all products in the product family, minus any excluded products. ■ You can modify this field in any state, except for Completed and Archived. ■ This field is optional. ■ Enforced in Advanced Pricing.
Maximum Orders Per Customer	■ Maximum number of orders per customer for the offer. ■ Available at the: – Discount rule level for Off-Invoice, Accruals, and Terms Upgrade offers. – Offer header level for Promotional goods and Order Value offers. ■ You can modify this field in any state, except for Completed and Archived. ■ This field is optional. ■ Enforced in Advanced Pricing.

Table 5–10 Maximum Caps

Field Name	Description
Maximum Quantity (Per Discount Rule) in Units	■ The maximum number of units available for this discount rule.
Maximum Committed Amount (Per Discount Rule)	■ Corresponds to the total cost associated with the offer and maps to the <i>promotional level cost cap</i> in Oracle Pricing. ■ The total budget approved amount must be greater than or equal to this cap; otherwise, you cannot activate the offer. ■ Depending upon how Trade Management is implemented, you may or may not be able to modify this amount. ■ Enforced in Oracle Pricing ■ This field is mandatory.

5.2.1.4 Setting Up Market Eligibility

Use Marketing Eligibility to designate which customers are eligible for an offer. The information you enter becomes a qualifier that is used by Advanced Pricing. Refer to *Oracle Advanced Pricing User's Guide* for more information.

The values that you see for the various columns can be either seeded values or values that were created based on the business needs of your organization.

Prerequisites

An offer must be created.

Steps

1. Navigate to Product > Offers.
2. Select the offer name.
The Offer Details page appears.
3. Navigate to Execution > Market Eligibility.
The Offer Details - Market Eligibility page appears.
4. For each customer type, complete a row in the table as follows:
 - a. In the Market Context column, open the drop-down list and select a value.

- b. In the Context Attribute column, click the search icon and select a value. The values displayed are determined by the Market Context selected.
- c. In the Condition column, open the drop-down list and select an operator.

Note: Select the Between operator to indicate a range of values. Designate the range by selecting values in the Attribute Value From and Attribute Value To columns.

Select the = (equals) operator, and enter a value in the Attribute Value From column to indicate a value equal to the one specified in the Value From column.

The operator not = (not equal to) is not supported in Trade Management.

- d. Depending upon the condition selected, enter values in the Attribute Value From and Attribute Value To columns as appropriate. Depending upon the condition selected, enter the value by:
 - Clicking the search icon and selecting a value.
 - Typing a value in the field.

The values displayed when you click the search icon depend upon the Context Attribute selected. Refer to the Note above and the example below for guidelines.

- e. In the Group Number column, type a value.

Group determines how the rows are combined with each other. Rows with the same group number are evaluated as an AND condition; Rows with different numbers are evaluated as an OR condition.
- f. To select start and end dates, click the calendar icons and select dates.

Note: For each line with the same group number, the start and end dates must be exactly the same. If different dates are entered for either field, the grouping will be ignored.

- 5. Click Update.

Example

Create a market eligibility group wherein all orders must be received between March 14, 2003 and August 14, 2003.

Customers can belong to the Gold segment and must place orders between \$25,000 and \$50,000. Or they can belong to the Bronze segment and must place orders with an amount of \$40,000 or more.

Market Context	Context Attribute	Condition	Attribute Value From	Attribute Value To	Group Number	Start Date	End Date
Customer	Segments	=	Gold Customer	N/A	2	N/A	N/A
Order	Order Date	Between	March 14, 2003	August 14, 2003	2	N/A	N/A
Volume	Order Amount	Between	25000	50000	2	N/A	N/A
Customer	Segments	=	Bronze	N/A	3	N/A	N/A
Order	Order Date	Between	March 14, 2003	August 14, 2003	3	N/A	N/A
Volume	Order Amount	=	40000	N/A	3	N/A	N/A

5.2.1.5 Working with the Performance Requirements

Performance requirements are all of the rules a customer must execute and comply with to qualify for the discounts defined in an offer. Offer Performance allows you to define the performance rules on various products for an offer. You can specify detailed performance information and multiple execution dates for different products within the range of the offer duration. You can also specify performance on products that are not included in the offer.

Prerequisites

An offer must be created.

Steps

1. Navigate to Product > Offers.
2. Select the offer name.

The Offer Details page appears.

3. Navigate to Planning > Performance.

The Offer Details - Performance page appears.

If any performance rules are already defined, the rules are automatically displayed on the page and new rows appear at the bottom of the table.

4. For each performance requirement, complete a row in the table as follows:

- a. In the Level column, open the drop-down list and select the product level.
- b. In the Name column, click the search icon and select a value. The values displayed are determined by the level you select.
- c. In the Trade Medium column, click the search icon and select a value.
- d. Select the Start and End dates for the performance requirement by clicking the calendar icons and selecting dates.
- e. In the Estimated Value column, you can enter the amount you estimate this offer and performance requirement will generate in sales.

This field is for information purposes only and has no functional impact. The currency of the estimated value should be the same as the budget currency being used to fund the offer.

5. If execution of the performance requirement is mandatory, select the Required check box.

If Required is selected, the earnings are not be paid out until the individual processing the claim determines that the performance requirements have been met. For example, the customer may have to submit proof of compliance.

6. Click Update to save the data.

After clicking Update, the page refreshes and the Notes icon is enabled.

7. Enter the details for each performance requirement as follows:

- a. Click the Note icon.
- b. Type the requirements into the text field.
- c. Click Update.

5.2.1.6 Requesting Funding for an Offer

A budget request is a request to withdraw money from a budget. A budget can provide funding for multiple promotions. Likewise, a promotion can draw (source) money from multiple budgets. If an offer sources from multiple budgets, the offer accruals are recorded against the budgets proportionately. For more information, see [Section 5.1.2.1.2, "Sourcing"](#) for more information.

Prerequisites

- An offer must be created.
- You must have access to the Budget Request page for the offer.
- A budget.

Steps

1. Navigate to Product > Offers.
2. Select the offer name.
The Offer Details page appears.
3. Click Budget in the side navigation bar.
The Offer Details - Budget Source page appears.
4. Verify that an Initial Budget Estimate has been entered. If not, enter one now and click Update.
5. Click Create Request.
The Budget Source Create page appears.
6. In the Budget Source section:
 - a. Open the Source Type drop-down list and select one of the following:
 - Budget (the actual budget)
 - Person (the individual who will determine the budget to be used for the offer).
 - b. In the Source Name field, click the search icon and select a budget or a person's name.
If budget was selected as the source type:
 - You will see only the active budgets that you have access to.

- Once you have selected a budget, the budget number and owner are displayed.

7. In the Request Details section:

- a. Optional: In the Required By field, click the calendar icon and select the date by which you require approval for the funds.

This field is for information purposes only. It allows the approver to see the urgency of the request.

- b. In the Requested Amount field, enter the amount of funding you require.
- c. Optional. Open the Holding Owner drop-down list and select Partner or Vendor.
- d. Optional. Open the Transfer Reason drop-down list, and select a value.
- e. Optional. In the Justification text field, type a justification.

This field is for information purposes only. You might want to explain the reason for the budget request or how the money will be used.

8. Click Create.

The Offer Details - Budget Source page appears.

9. Do one of the following:

- To request funding from another budget, click Create Request and repeat these steps.

–

The information in the Budget Recipient section of the page is automatically populated. It is based on the initial estimated budget, and the offer type, name, code, and owner.

5.2.1.7 Offers Advanced Options

Advanced Options are used to more precisely control the behavior of Offers in Oracle Advanced Pricing. For more detailed examples and explanation, please refer to the *Oracle Advanced Pricing User Guide*.

Buckets: The pricing engine may calculate different selling prices depending on how you group your discounts into buckets. Plan your cascading discounts so that you can assign discounts to buckets based on the subtotal on which each discount needs to be applied.

Phases: Decide to which order event (unrelated to Marketing event) and phase each discounts and promotions belong.

Incompatibility Groups and Exclusivity: Determine the pricing bands to which the various discounts and promotions belong. Determine which discounts and promotions apply on top of one another, are incompatible, or are exclusive.

Print On Invoice: An option that enables the offer/discount to be printed on the invoice as opposed to automatically adjust the unit price w/o showing a discount.

Precedence: The final tiebreaker for the determining which offer to apply. A lower value has higher precedence than a higher value.

Prerequisites

An existing offer.

Steps

1. Navigate to Planning > Advanced Options. The Offer Name, Start, and End Dates are displayed.
2. Select a Phase from the following:
 - List Line Adjustment.
 - All Lines Adjustment.
 - Header Level Adjustments.
 - Line Charges.
 - Header Level Charges.
 - Line Charges - Manual.
 - Modifiers for BOOK Event.
 - Logistics Exchange Shipment Charges.
3. Select Print on Invoice to print the Phase information on the invoice.
4. Select one of the Incompatible Group, if appropriate:
 - Exclusive Group
 - Level 1 Incompatibility
 - Level 2 Incompatibility
 - Level 3 Incompatibility

5. Select a Bucket if appropriate.
 - Base Price
 - Pricing Adjustments Bucket 1
 - Pricing Adjustments Bucket 2
 - Pricing Adjustments Bucket 3
6. Set the Level of Precedence.

5.2.1.8 Searching and Viewing Offers

You can search and view offers using several different methods, using the saved searched (Offers summary), Quick Find, and Customer-specific search. See [Appendix A.2, "Search Functionality"](#) for details.

Although Quick Find does not have offers as selectable option, you may still choose source code and search for a specific offer source code.

In additional to the saved searches and quick find, Trade Management also enables a user to view all offers to which a specific customer would be entitled. When planning to create a Deal or offer for a specific customer, you can see all the offers that the customer would be entitled to based on the market eligibility information.

Prerequisites

An existing offer

Steps

1. Navigates to the Offers Summary page.
2. Select the customer context.
 - Buying Group
 - Customer: Bill To
 - Customer: Sold To
 - List
 - Segment
 - Territories
3. Select the specific name from the list of values.
4. Click search to display a list of offers specific to the customer selected.

5.2.1.9 Creating Offer Adjustments

Offer Adjustments functionality provides the mechanism for the user to specify the adjustments to an existing Offer. The user can optionally modify the discount offered in an offer, change the date for the new discount to be effective from a future date or to a past date and specify the settlement method for the offer. The adjustments made are sent to the offer approval process. Once the adjustments get approved, the adjustment details will be applied to the actual Offer.

Note: Offer Adjustments are not available for Terms Upgrade and Lump Sum Offer types.

Prerequisites

An active offer

Steps

1. Navigate to the Adjustments side navigation link for an active offer. The summary of all the existing adjustments to that particular offer will be listed. You can create a new Adjustment or modify the existing Adjustment.
2. Use the Create button to initiate the creation of new Adjustment. You can create a new adjustment only if your are creating the adjustment for the first time or all the existing Adjustments are approved or rejected.
 - a. Enter the name of this adjustment record
 - b. Select the Settlement method to settle the difference in discount for already discharged products in case of backdated offers either via check or accrue the credit on account.
 - c. Enter the Effective Date that must be within the start date - end date range.
 - d. Enter the new discount (based on the existing discount rules).
 - e. Click Update to create the new adjustment record.

The change in the status will initiate a workflow for Offer Adjustment approval depending on the status order rule. During the process, the status will change to pending approval internally, and if gets approved the status will change to approved or rejected.

For different type of offers there are different rules governing the adjustments:

Table 5–11 Offer Adjustment Rules for Offer Types

Offer Type	Adjustment Rule(s)
Off Invoice Offer	The user may modify the discount amount or percent value. The user may backdate the request and/or have the new values commence on a specific date.
Accrual Offer	The user may modify the accrual amount or percent value. The user may backdate the request and/or have the new values commence on a specific date.
Order Value Offer	The user may modify the discount amount or percent values as they pertain to each line defined in the Offer. The Order Value "From" and Order Value "To" values may not be modified. The user may backdate the amount or percent values modification and/or have the new values commence on a specific date.
Promotional Goods Offer	The user may modify the discount amount or percent value for the products detailed for the "Get" condition only. The user may backdate the request and/or have the new values commence on a specific date.
Volume Offer	The user may modify the discount amount or percent values as they pertain to each volume "tier" defined in the Volume Offer. The Volume "From" and the Volume "To" tier values may not be modified. The user may backdate the amount or percent values modification and/or have the new values commence on a specific date.
Trade Deal	Off Invoice Component - The user may modify the discount amount or percent value. The user may backdate the request and/or have the new values commence on a specific date. Accrual Component - The user may modify the accrual amount or percent value. The user may backdate the request and/or have the new values commence on a specific date. For Trade deal Offers the effective date for backdating and/or commencement of modified values must be the same for both the Off Invoice component and the Accrual Component. Effective dates for both each component cannot differ.

5.2.1.10 Copying Offers

You can copy existing offers, thereby reducing offer set up time. This functionality provides you with an exact copy of an offer including its corresponding parameters, date ranges, products, and discount levels. Once the copy is made, you can modify the offer as necessary.

To copy an offer, follow the steps below.

Prerequisite

An offer must exist.

Steps

1. Navigate to Campaign > Offers.
2. Click Copy.
The Copy - Offers page appears.
3. In the Source Offer field, click the search icon and select an offer.
4. In the New Offer field, enter a name for the new offer.
5. In the Source Code field, do one of the following:
 - Enter a new source code manually.
 - Delete the source code and leave the field blank. The application assigns a new source code automatically after you click Copy.
6. For the Start and End Date fields, click the calendar icon and select new dates.
7. In the Description box, type a new description for the offer.
8. In the Copy Components section, select the check boxes for the components you want to copy.
9. Click Copy.

5.2.2 Creating and Managing Forecasts

The Forecast functionality provides you with a tool to evaluate and consider historical data when designing a promotional offer. The Manufacturer's ROI Calculator enables you to perform cost-benefit analysis to determine the best product, price, and promotion proposition for a specific customer target.

5.2.2.1 Creating a Forecast

To create a forecast, follow the steps below.

Prerequisites

Verify the following before creating a forecast:

- Verify with the DBA that the concurrent manager program, AMS-TM: Refresh of Base Sales Materialized View, is set to run and has been completed successfully at least once; otherwise, the Base Volume will be zero.
- Complete the AMS-TM Default Forecast UOM profile. 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.
- Create an offer with a Custom Setup containing the Forecast item on the Side Navigation Menu.

Steps

1. Navigate to Campaign > Offers.
2. Select the offer and verify the following:
 - a. One or more products are selected.
 - b. The Start and End Dates are past. Dates are used to reference historical values.
 - c. One or more customers are selected by navigating to Execution > Market Eligibility.
3. Return to the Offer Details page and navigate to Forecast.
4. Click Create. The Forecast Details page appears.
5. Leave the Freeze check box unselected.
6. Optional: Change the Unit of Measure (UOM) by deleting the current value, clicking the search icon, and selecting a new value.
7. In the Price List field, click the search icon and select a price list.
8. In the Total Forecast field, enter a value in the appropriate unit of measure.

The Total Forecast is the quantity to be forecasted over the product and customer combinations. It must be inclusive of the Forward Buy quantity.
9. In the Forward Buy field, enter a value in the appropriate the unit of measure.

The Forward Buy is the quantity you expect will be purchased during the offer specifically to take advantage of the offer.
10. Open the Automatic Spread drop-down list and select a value.

- *Baseline Ratio*: The Base Volume is divided across the products in the same ratio as the relative sales volume. For example, if Product A sold 800 units and Product B sold 400 units, and the Total Forecast is 3000 units, the default forecast is 2000 units of Product A and 1000 units of Product B.
- *Across All Evenly*: The Base Volume is divided evenly across all products. For example, if Product A sold 800 units and Product B sold 400 units, the default forecast would be 1500 units of Product A and 1500 units of Product B.
- *Buy-Get Ratio*: Available for promotional goods offers only. Used for calculating the default product forecast for these offer types.

For example, an offer is defined as Buy 2 Units of Product A and Get 1 Unit of Product B at X discount. If the total forecast is 300, then the forecast for Product A will be 200 and Product B will be 100.

If the *get* product is free (in other words, if it has a 100% discount), then the forecast for Product A will be 300 and Product B will be 300. You do not need to forecast free products. The application assumes that free products are always included when the corresponding *buy* product is sold.

Note: For information on the base volume, see [About Base Volume and Base Volume Source](#) below.

11. Open the Period View drop-down list and select a value.
12. In the Comments box, type any additional information you would like to add to this forecast.
13. Under Forecast Order, do the following:
 - a. Open the Forecast By drop-down list and select your first dimension for the forecast.
 - *Product*: Selecting Product as the first dimension spreads the Total Forecast over the Products first.
 - *Market*: Selecting Market as the first dimension spreads the Total Forecast over Eligible Markets first.
 - *Time*: Selecting Time as the first dimension spreads the Total Forecast over time first. This is calculated on the Period View. The total time period for the offer is divided by the Period View to give a number of periods. This number is rounded up to the nearest whole number. For

example, if the offer is good for 30 days and the Period View is one week, the number of periods will be $30 \text{ days} / 7 \text{ days} = 4.29$ rounded up to 5.

- b. Click Calculate.

The page redraws, and the *then by* dimension appears. The first dimension spread is listed in a table at the bottom of the page.

- c. Optional: Open the drop-down list and select a second dimension; then click Calculate.

The page redraws, and the *and then by* (final) dimension appears.

- d. Click Details to view the second and third dimension spreads, if any. The page redraws and displays the spreads.

- 14. To Freeze the Forecast, click the Total Forecast.

The Forecast Details page appears.

- 15. Select the Freeze check box and click Update.

Note: Once a forecast is frozen, it cannot be changed. If changes are made to the Offer in either products or market eligibility, the existing forecast must be recreated to reflect the changes. See [Section 5.2.2.3, "Creating a New Version of a Forecast"](#) below.

About Base Volume and Base Volume Source

The Base Volume is completed for you. Base Volume is the historical sales data from Order Management, based on all closed order lines for the selected customers and products of the offer during the time period specified by the Base Volume Source.

The Base Volume Source defaults to Last Year Same Period. Forecasts are always based on the sales during the period one year prior to the current offer begin and end dates.

5.2.2.2 Editing a Forecast

Only unfrozen Forecasts may be edited.

Prerequisites

An unfrozen Forecast.

Steps

1. From the appropriate Offer Details page, click the Forecast item on the Side Navigation Menu.
2. In the Forecast table, click the Version number link of the latest version.

5.2.2.3 Creating a New Version of a Forecast

Once a Forecast is frozen, it cannot be modified. A new version must be created.

Prerequisites

A frozen Forecast.

Steps

1. From the appropriate Offer Details page, select the Forecast item on the Side Navigation Menu.
2. Click Create Next Version. This will copy all of the details from the most recent version of the Forecast into the new Forecast.
3. Modify the fields of the next version as desired.
4. Click Update to save your changes.
5. Select the Freeze check box if you are ready to freeze the forecast.

5.2.2.4 Viewing the Manufacturer's ROI (Return on Investment)

A ROI table may be generated from the Forecast. This table takes the information from the Forecast and, using the unit cost for the various products, calculates ROI information for the products contained in the Forecast, including the discount information from the Offer.

Prerequisites

A completed Forecast.

Steps

1. Navigate to Campaign > Offers.
2. Select the offer name.
The Offer Details page appears.
3. Navigate to Forecast.
4. Click the Version number link for the appropriate Forecast Version.
5. Enter a price list. Click Save.
6. Click Manufacturer ROI.
7. The default view will be for the forecast. From the drop-down menu, choose the Forecast vs. Actuals view. The page displays the selected view.
8. Click Calculate ROI to complete the table with the ROI information. Here are the values that can be displayed in the table:
 - Product List Price is the price of the product based on the Price List selected above.
 - Discount can be Percent, Amount, New Price, Lump Sum based on the Offer itself.
 - Value is the numeric value of the discount per unit. For example, if the discount was 10% and the list price \$100, then value will be \$10.
 - Selling Price = List Price - Discount Value (Exception: For discount type Accrual, the selling price is same as list price.)
 - Unit Cost is the unit cost of goods, and the number is returned from Inventory.
 - Margin Amount = Selling Price – Unit Cost.
 - Margin % = (Margin Amount/Selling Price)*100.
 - Forecast Units are taken from the Forecast itself.
 - Forecast Revenue = Forecast Units x Selling Price.
 - Forecast Costs = Forecast Units x (Unit Cost + Discount Value).
 - Forecast ROI = (List Price – (Unit Cost + Discount Value)) / (Unit Cost + Discount Value).
 - Total Forecast Units = sum of all lines.

- Total Forecast Value = sum of all lines.
- Total Forecast Costs = sum of all lines.

5.2.3 Creating and Managing Trade Management Budgets

Use the following procedures to create and manage budgets in Trade Management. The procedures you will find in this section include:

- [Section 5.2.3.1, "Creating Budget Allocations"](#)
- [Section 5.2.3.2, "Creating Fully Accrued Budgets"](#)
- [Section 5.2.3.3, "Updating Market Eligibility for Fully Accrued Budgets"](#)
- [Section 5.2.3.4, "Updating Products for Fully Accrued Budgets"](#)
- [Section 5.2.3.5, "Updating Budgets During a Top-down, Bottom-up Budgeting Process"](#)

For procedures not found in this section, refer to [Section 2.2.12, "Creating and Managing Budgets"](#).

5.2.3.1 Creating Budget Allocations

Budget allocations allow you to allocate money to each of your sales territories. Using this automated feature, you can:

- Designate the total amount of an allocation, and automatically distribute roll-down values to all levels in the hierarchy. The values are based on sales (shipped order amounts) from the prior year.
- Designate a holdback amount to ensure the availability of funds for future needs.
- Edit allocation amounts before final allocation.
- Transfer funds from one allocation fund or budget to another.
- Release holdback funds incrementally.

To create budget allocations, follow the steps below.

Prerequisites

- A draft or active fixed budget with an available amount that is greater than \$0.
- A territory hierarchy. (Must be created in Territory Manager by your system administrator.)

Steps

1. Navigate to Budget.
2. Click the budget name.
3. Navigate to Allocation.
The Allocation Overview page appears.
4. Click Create.
5. Open the Action drop-down list, and select one of the following:
 - Create New Budget from this Allocation
Allows you to create a new budget hierarchy under this budget. Useful if there has been significant reorganization of the territory since the last allocation.
 - Add on to Existing Budget Hierarchy
Adds money to the budget hierarchy created by a previous allocation.
6. If you selected Create New Budget from this Allocation, proceed with this step. If not, go to the next step.

Note: Examples for creating new budget hierarchies are shown under [Budget Hierarchy Designation Examples](#) below

- a. Open the Hierarchy field drop-down list and select the top-level hierarchy name.
 - b. In the Start Level field, click the search icon and select the hierarchical level at which the allocation will start.
 - c. In the End Level field, click the search icon and select the hierarchical level at which the allocation will stop.
 - d. In the Start Point field, click the search icon and select a territory name.
The list comprises all of the territories that are at the start level you selected. The territory you select is the starting point of the allocation.
 - e. Optional. To exclude the Start Point territory from the allocation, select the Exclude Start Node from this Allocation check box.
7. If you selected Add on to Existing Budget Hierarchy

- a. To select a new Start Point, delete the default value, click the search icon and select a territory name.
- b. If you changed the Start Point, you may need to enter a new value in the # of Levels from Start Node field.

This value determines the number of levels in your hierarchy. The start node is the start point.

8. Optional. In the Active From and Active To fields, click the calendar icons and select start and end dates for the budget allocation.

If no dates are selected, the allocation start and end dates are the same as those for the parent budget.

9. Open the Method drop-down list and select one of the following values:
 - Even Distribution which divides the allocation amount evenly across all territories.
 - Manual which opens a blank allocation worksheet when the allocation is created.
 - Prior Year Sales Total in Amount (available only if you are creating a new budget allocation hierarchy) which uses the sales figures from a prior year for each territory, and divides the amount proportionately.

For example, in the prior year the US West territory contributed 10% of the total sales for the selected hierarchy. If the allocation amount for this year is \$1,000,000, the US West territory would be allocated \$100,000. Sales are defined as orders where shipment has been confirmed.

10. If Prior Year Sales Total in Amount was selected, open the Basis Year drop-down list and select a year.

The sales figures from this year will be used to divide the allocation.

11. In the Allocation Amount field, enter the amount to be allocated.
12. Click Generate.

The Allocation Details page appears. It has an Amount Distribution table at the bottom.

13. Optional: Specify a holdback for one or more hierarchical levels by scrolling down to the Amount Distribution table and entering a value in the amount or percent columns for the appropriate levels.
14. Click Worksheet. The Allocation Worksheet page appears.

15. On the allocation worksheet:

- If you selected Manual as the method, you must now manually define how the allocation is to be divided among the various levels.
- You can change the values in the Total and Reserved columns for each level individually, or once at the top level. For your top level change to be reflected in the lower levels, select the Cascade Changes check box and click Update.

16. Click Publish. Notice that the allocation status changes to Planned.

The budget allocation hierarchy is created, and each territory becomes a sub-budget. The primary contact for the territory is automatically assigned as the budget owner.

17. Optional. You can change the allocation status.

- Select Active if no bottom-up input is required. All of the allocations for the hierarchy become active.
- Leave the status as Planned if you want to allow for bottom-up input. The budget owner for each territory can access their allocation worksheet and continue the top-down, bottom-up budgeting process.

Budget Hierarchy Designation Examples

We will use the following simple territory hierarchy for the examples below. The budget name is Sales Budget 03.

Level	Territory
World	Global Sales Territory
Country	United States
Region	California
Region	New York
Country	United Kingdom
Region	London
Region	Manchester

Example 1 — *Exclude Start Node from this Allocation* is NOT Selected

You decide to create a new budget hierarchy and select:

Hierarchy = Global Sales Territory

Start Level = Country

End Level = Region

Start Point = United States

Exclude Start Node from this Allocation = not selected

Your selections result in the following hierarchy for the allocation:

Budget Hierarchy

Sales Budget 03

 United States (Start Level selected)

 California and New York (End Level selected)

If you had selected United Kingdom as the Start Point for this scenario, your territory hierarchy would be:

Sales Budget 03

 United Kingdom

 London and Manchester

Example 2 — *Exclude Start Node from this Allocation IS Selected*

You decide to create a new budget hierarchy and select:

Hierarchy = Global Sales Territory

Start Level = Country

End Level = Region

Start Point = Global Sales Territory

Exclude Start Node from this Allocation = selected

Your selections result in the following sub-hierarchy for the allocation:

Budget Hierarchy

Sales Budget 03

 United States

 California and New York

 United Kingdom

 London and Manchester

If you had not selected Exclude Start Node from this Allocation, your territory hierarchy would be:

Sales Budget 03

 Global Sales Hierarchy

 United States

 California and New York

 United Kingdom

 London and Manchester

5.2.3.2 Creating Fully Accrued Budgets

A fully accrued budget has a zero budget amount at the time of creation and activation. Based on the accrual parameters specified in this budget, customers placing orders may earn accruals. Budget amounts will be increased based on such actual sales accruals.

In the application, a fixed budget is one that is created with Type = Fully Accrued.

Prerequisites

- A Set of Books must be defined.
- Advanced Pricing should be set up, as a fully accrued budget creates a pricing modifier in the background.

Steps

1. Navigate to Budget.
2. Click Create.
3. Select a Setup Type.
4. Enter a Name for the Budget.
5. Enter a unique Number or leave the field blank. The system will automatically generate a unique budget number.
6. Select a business unit.
7. Optional. Select a parent budget.
8. Select the budget defaults from Setup Type.
9. Select a budget category.
10. Verify the budget amount is zero.
11. Verify the currency type.
12. Verify the holdback amount is zero.
13. Verify the owner.
14. Optional. Enter start and end periods. These periods map to GL calendars.
15. Select a Start Date.
16. Optional. Select an End Date.

17. Optional. Type any additional information regarding the budget in the Description box.
18. Select an Accrue To value.
19. Select an Accrual Basis.
20. Optional. Select a Market.
21. Optional. Select a Territory Level.
22. Optional. Select the Retroactive Flag.
23. Select a Discount Level.
24. Optional. Select the Liability Flag.
25. Click Create.

5.2.3.3 Updating Market Eligibility for Fully Accrued Budgets

For a fully accrued budget, on the other hand, market eligibility can be defined by fully using the highly configurable Qualifier Contexts and Attributes as set up in Advanced Pricing. Using the qualifier contexts and attributes, all of the same market eligibilities available for fixed budgets – customers, buying groups, lists, segments, territories – are available for fully accrued budgets. In addition, more groupings can be configured.

Market eligibility for a fully accrued budget serves the following main purposes:

- Defining which customers or customer groups qualify to get the accruals
- If the fully accrued budget is either accruing to the sales level, or to the customer level with the liability flag off, then the fully

accrued budget amount can be used to fund offers just like a regular fixed budget. In such cases, the eligibility validation described above will also apply for fully accrued budgets.

Prerequisites

A draft fully accrued budget has been created.

Steps

1. Navigate to Budget.
2. Select a budget name.
3. To update information on the Budget Details page:

- a. Change the information as desired.
 - b. Click Update.
4. To update Accrual Parameter Details:
 - a. Click the Accrual Parameter Details button.
 - b. Click the Execution link in the side navigation bar.
 - c. Enter or modify information as desired on the Offer Details - Market Eligibility page.
 - d. Click Update.

For more information, refer to the Advanced Pricing documentation.

5.2.3.4 Updating Products for Fully Accrued Budgets

Product eligibility defines what product or product families or groups the budget is targeting.

Prerequisites

A draft fully accrued budget exists.

Steps

1. Navigate to Budget.
2. Select a budget name.
3. Click Accrual Parameters Details.

The Offer Details page appears.

4. Enter all of the products eligible for the budget.

For more information, refer to the Advanced Pricing documentation.

5.2.3.5 Updating Budgets During a Top-down, Bottom-up Budgeting Process

When budget amounts are allocated from management down to lower levels without input from lower levels, it is a top-down budgeting process. When budget amounts are rolled up from lower levels to management, it is a bottom-up process.

Companies may use a combination of both by first allocating budgets based on some criteria such as prior year sales, then by accepting input from lower levels. Multiple such top-down and bottom-up cycles may continue until budget numbers are finalized. Trade Management helps manage this time-consuming budget

process and facilitates communication between management and sales people at all levels in the sales hierarchy.

Prerequisites

A draft or active fixed budget has been created and an allocation has been initiated. The allocation is not active yet.

Steps

1. Navigate to Budget.
2. Select a budget name.
3. Navigate to Allocation.
4. Modify the information as desired.
5. Click the Allocation Number.
6. Modify the information as desired.
7. Click Update.

5.2.3.6 Viewing Trade Management General Ledger Postings

If you have the proper access, you can view Trade Management postings to Oracle General Ledger (GL). The Budget Utilized column contains all:

- Accruals, including those created for accrual, lumpsum, volume rebate, and scan data offers.
- Adjustments made to the utilized column.
- Off-invoice discounted amounts.
- Costs posted to budgets from marketing objects such as campaigns and events.

To view Trade Management postings to GL, follow the steps below.

Prerequisites

The ability to view postings in GL.

Steps

1. Log in to GL.
2. Navigate to Inquiry > Journal.

3. Search for Source = Marketing.

The categories used by Trade Management are:

Fixed Budget — the accruals recorded in a fixed budget.

Accrual Budget — the accruals created by a fully accrued budget.

Settlement — the postings created when a promotional claim or deduction is settled.

5.2.3.7 Viewing Recalculated Committed

Recalculated Committed is an option that your organization can implement. It is used to automatically recalculate (increase or decrease) the funding for a promotion based on its actual performance. If the promotion is performing better than expected, funds are automatically increased. If not, they are automatically decreased.

To view recalculated committed, follow the steps below.

Prerequisites

- Recalculated committed must be implemented.
- The ability to view budgets.

Steps

1. Navigate to Budget.
2. Click Personalize.
3. Select and move Recalculated Committed from the Available Columns to the Displayed Columns.
4. Click Save or Save and Apply.
5. Click the Recalculated Committed amount.

The Budget Detail - Recalculated Committed page appears.

Note: If the recalculated committed function is not implemented, the amount displayed is the same as the committed amount.

5.2.3.8 Performing Budget Adjustments

For various reasons such as errors or under-performance, you may need to adjust the committed and utilized amounts for promotions. For example, your organization extends a lumpsum offer for \$10,000 to a customer for displaying in-store advertisements. The budget utilized amount is increased by \$10,000 at the start of the offer. Later, you determine that this customer failed to meet the offer requirements. You must now decrease the utilized amount for this offer.

Keep the following list of rules in mind when adjusting a budget:

- You cannot cancel a budget to which you have an approval campaign tied. You must first cancel all associated campaigns, then cancel the budget.
- If you cancel a budget with existing campaign activities in the approval process, the system sends an alert to the campaign owner stating that the campaign must either be cancelled or funded by alternate budget.
- If an adjustment reference includes a product, the system posts the full adjustment against the specified product.
- If the adjustment references a campaign and offer, the system applies the adjustment amount equally among all products in the offer.

To perform budget adjustments, follow the steps below.

Prerequisites

You must be able to access the budget and adjustment functions.

Steps

1. Navigate to Budget.
2. Select the budget name.
The Budget Detail page appears.
3. Navigate to Checkbook.
4. Click Adjustments.
5. In the Type field, click the search icon and select the type of adjustment you need to make.

After you select the Type, a description of the adjustment type is displayed in the Description field. The name and description of your adjustment types is determined by your organization. They are all based on one of these actions:

decrease committed, decrease committed and utilized, decrease utilized, and increase utilized.

6. In the Amount field, type the amount of the adjustment.
7. Optional. In the Date field, click the calendar icon and select the date on which you want the adjustment to be recorded.
8. Optional. If accrual postings are affected, and if you want to specify the date GL postings are to occur, then click the calendar icon in the GL field and select a date.

If a date is not selected, a default date is used by the system.

9. In the Activity Type field, open the drop-down list and select the type of activity this adjustment is related to.

The available activity types are campaign, event, deliverable and offer.

10. In the Activity Name field, click the search icon and select the name of the activity associated with this adjustment.
11. Required only if the activity type is Campaign or Event. In the Schedule field, click the search icon and select the schedule that corresponds to the activity.
12. Optional. You can associate a document with the adjustment as follows:
 - a. Open the Document Type field drop-down list and select the type of document.
 - b. In the Document Number field, click the search icon and select the document number. The values displayed are determined by the document type selected.
13. Specify the customer as follows:
 - a. In the Customer field, open the drop-down list and select Customer or Buying Group.
 - b. Click the search icon and select the name of the customer or buying group.
14. Optional. To specify a product or product category,
15. To enter additional information about the adjustments, type that information in the Comments field.
16. Click Create.

5.2.3.9 Viewing Budget Paid

The information you can access via the Paid column of a budget includes the payment information for off-invoice offers, claims settled through credit memos or checks, and deductions settled by credit memos.

The following information is presented:

- One of the following
 - An activity type and code (for offers)
 - A claim type, number, and date
- Document type, number and date (displayed for offers only; typically this information an order number and date)
- Customer name.
- Payment method. Information is displayed in this column for claims only. The settlement method is displayed. If you click Payment Method, the Claim Detail page is displayed.
- The paid amount in different currencies including:
 - Transaction currency — the currency from the order transaction or claim.
 - Budget self currency — the currency in which the budget is created.

Prerequisites

- A budget with a paid amount.
- The ability to access budgets.

Steps

1. Navigate to Budget.
2. Locate the budget you want to view, then click the amount in the Paid column.
The Budget Detail - Paid page appears.

5.2.3.10 Viewing Campaign and Offer Summary Checkbooks

Campaign and offer checkbooks summarize the main budget buckets utilized. When you view the checkbook for a campaign or offer, you can see the following information:

- The offer or campaign name, source code, start and end dates, status, currency, and total committed amount.
- The name of the budget funding the offer or campaign. If you click the budget name, the details page for the budget is displayed.
- The budget number.
- The planned amount (a request for funds that is pending approval). If you click the amount in the Planned column, the Budget Detail - Planned page appears. It presents a summary of all the planned amounts for that particular budget.
- The committed amount (the amount of money approved and committed to the campaign or offer). If you click the committed amount, the Budget Detail - Committed page appears. It presents a summary of all the committed amounts for that particular budget.
- The recalculated committed amount (the committed amount based on actual sales and utilization). If you click the recalculated committed amount, the Budget Detail - Recalculated Committed page appears. It presents a summary of all the recalculated committed amounts for that particular budget.
- The amount utilized for the campaign or offer. For a campaign, this number is the actual costs posted to the budget or an adjustment. For an offer, this number can represent an adjustment, an accrual, or a utilization line from an off-invoice type discount. If you click the utilized amount, the Budget Detail - Utilized page appears. It presents a summary of all the utilized amounts for that particular budget.
- The actual costs posted to the budget. For an offer, this can be a utilization line from an off-invoice type discount or the information from a claim. If you click the Paid amount, the Budget Detail - Paid page appears. It presents a summary of all the paid amounts for that particular budget.

Prerequisites

- A budget with a committed amount.
- The ability to access budgets.

Steps

1. Navigate to Budget.
2. Locate the budget you want to view, then click the amount in the Committed column.

The Budget Detail - Committed page appears.

3. In the Name column, click the offer or campaign name.

The Budget Summary Checkbook page appears.

5.2.4 Creating and Managing Claims

The following procedures provide instructions on creating and managing claims.

5.2.4.1 Creating Claims and Debit Claims

To create a claim or debit claim, follow the steps below.

Prerequisites

None.

Steps

1. Navigate to Claim, and click Create.

The Create Claim page appears.

2. Optional. In the Claim Number field, enter a unique value.

If no value is entered, a unique claim number is generated automatically when the claim is created.

3. In the Claim Type field, click the search icon and select a claim type.

Claim Type is one way to classify a claim. It can be integrated with Receivables and Order Management.

4. In the Reason field, click the search icon and select a reason.

Reason is another way to classify a claim. For example, one claim type could correspond to multiple reasons.

5. In the Customer field, click the search icon and select a customer name.

This field is the claiming customer. The available values are customer accounts set up in the TCA.

6. Optional. In the Bill To field, click the search icon and select a location.
The available values are customer account sites set up in TCA.
7. In the Currency Code field, change the currency if necessary by opening the drop-down list and selecting a value.
8. In the Amount field:
 - If this is a claim, enter a positive value.
 - If this is a debit claim, enter a negative value.
9. Optional. In the Exchange Type field, open the drop-down list and select a value.

In cases when the claim comes in with a different currency from the functional currency, conversion needs to take place. Exchange Type defines the type of exchange rate. For example, a Corporate exchange type may have a set of rates determined after every month-end market close.

Note: The Exchange Type, Rate, Currency and Amount fields are used when the Transaction and Accounted currencies are different. The value for this field must be User to perform an exchange rate conversion.

10. Optional. In the Exchange Date field, click the calendar icon and select a date.
Rates may differ based on the exchange date entered here.
11. Optional. In the Exchange Rate field, enter a value.
Based on the Exchange Type and Exchange Date entered above, an exchange rate may populate this field. If it is a user-defined exchange type, you can enter a different rate.
Example: If Sterling Pound is the currency type and 2 is the exchange rate, the value for Amount is converted at a rate of 2 Sterling Pounds:1 US dollar.
12. Click Create.

5.2.4.2 Mass Creating Claims and Debit Claims

The Mass Create function allows you to enter multiple claims and debit claims within Trade Management on one screen. All the basic information for claims can be captured quickly so that they can be routed to the proper owners in a timely fashion. Due to the massive volume of claims data that a company has to deal with, this function can help you expedite the claims process.

Prerequisites

None.

Steps

1. Navigate to Claim > Claims.
2. Click Mass Create.
3. Entering the following information for each row:
 - a. Optional. In the Claim Number field, enter a unique claim number or leave the field blank.

If the field is left blank, a unique claim number is automatically generated.
 - b. In the Claim Type field, click the search icon and select a Claim Type.
 - c. In the Reason field, click the search icon and select a reason.

The reason the customer is claiming.
 - d. In the Customer field, click the search icon and select a customer.
 - e. In the Bill To field, click the search icon and select a site name.
 - f. In the Currency Code field, open the drop-down list and select a currency.
 - g. In the Amount field, enter the amount of the claim.
 - h. If the amount is greater than zero, then a claim is created; otherwise, a debit claim is created.
 - i. If the currency for the claim is different than the functional currency, select an Exchange Type, Exchange Date, and Exchange Rate.
4. Click Create.

If an error occurs, the row with the problem is highlighted.

All of the claims entered in the table are created, and the Claims summary page appears.

5.2.4.3 Creating a Deduction (Transaction-related)

Rather than submitting claims, customers often deduct the money from their payments to manufacturers. They take deductions for many reasons including shipping errors, invoice errors, pricing discrepancies, packaging issues, and so on. A deduction can also be related to the promotional earnings of the customer. When this type of deduction can be traced back to one transaction (an invoice, chargeback, or debit memo), it is called a transaction-related deduction.

All of the information from Oracle Receivables is captured and passed to Trade Management, including the receipt number, receipt date, receipt amount, customer information and transaction information. Customer debit memo numbers and claim reasons may also be passed to Trade Management.

Deductions support related customer accounts and buying group promotions.

Prerequisites

A deduction that can be traced back to a specific transaction.

Steps

Note: The Receivables user may need to perform additional data entry tasks.

1. Log on to Oracle Receivables, and navigate to Receipts > Receipts.
2. In the Receipt Number field, enter a receipt number.
This number can be the customer check number or other reference number.
3. If necessary, change the Receipt Type to Cash.
4. If necessary, change the Currency Code.
5. Enter a Receipt Amount.
The amount the customer is paying.
6. If necessary, change the Receipt Date.
By default this is the current date.
7. If necessary, change the GL date.
By default this is the current date.

8. Select a Payment Method.
 9. Under the Customer tab, enter the Customer Name.
The customer remitting the payment.
 10. Optional. Enter a Reference and Comments.
This information is passed to Trade Management when the deduction is created.
 11. Click Applications.
 12. Select a value for Apply To.
What the customer is paying for.
 13. Enter the Amount Applied.
 14. View the Balance Due.
This amount is the balance of the transaction after the customer's payment. In the case of a deduction, the balance due will be positive.
 15. In the Reference Type field, select Trade Management Claim.
 16. In the Reference Reason field, select a reason.
The values available here are the same as in Trade Management. If a customer indicates the reason they have made the deduction, this information can be captured at the time of cash application in Receivable and passed to Trade Management.
 17. Enter a Customer Reference.
If the customer indicates an internal debit memo number, it can be captured here and passed to Trade Management.
 18. Click Save.
Notice that a deduction number appears in the Reference Number field.
- At this point, a transaction-related deduction is created. The transaction will also have a dispute on it. To verify the dispute, navigate to Transactions > Transactions > [transaction name] > More > Disputed Amount.

5.2.4.4 Creating a Deduction (Non-transaction Related)

Rather than submitting claims, customers often deduct the money from their payments to manufacturers. They take deductions for many reasons including shipping errors, invoice errors, pricing discrepancies, packaging issues, and so on. A deduction can also be related to the promotional earnings of the customer.

When such a deduction cannot be traced back to one transaction (invoice, chargeback or debit memo) it is called a non-transaction related deduction.

All of the information from the Receivable system is captured and passed to Trade Management, including the receipt number, receipt date, receipt amount, customer information and transaction information. Customer debit memo numbers and claim reasons may also be passed to Trade Management.

Deductions support related customer accounts and buying group promotions.

Prerequisites

A deduction that can be traced back to a specific transaction.

Steps

Notes: The following procedure presents only one way to enter a non-transaction related deduction.

1. Log on to Oracle Receivables and navigate to Receipts > Receipts.
2. In the Receipt Number field, enter a receipt number.
This number can be the customer check number or other reference number.
3. If necessary, change the Receipt Type to Cash.
4. If necessary, change the Currency Code.
5. Enter a Receipt Amount.
The amount the customer is paying.
6. If necessary, change the Receipt Date.
By default this is the current date.
7. If necessary, change the GL date.
By default this is the current date.

8. Select a Payment Method.
9. Under the Customer tab, enter the Customer Name.
The customer remitting the payment.
10. Optional. Enter a Reference and Comments.
This information is passed to Trade Management when the deduction is created.
11. Click Applications.
12. In the Apply To field, select Claim Investigation.
The available values are open transactions and some seeded receivables activities. Claim Investigation is seeded specifically to create non-transaction related deductions (or overpayments) in Trade Management. If the customer has referenced an internal debit memo number, you can record this as a Claim Investigation line and enter the debit memo number in the customer reference field.
13. In the Amount Applied field, enter the deduction amount as a negative number.
14. In the Reference Type field, select Trade Management Claim if necessary.
15. In the Reference Reason field, select a reason.
The values available here are the same as in Trade Management. If a customer indicates the reason they have made the deduction, this information can be captured at the time of cash application in Oracle Receivables and passed to Trade Management.
16. Enter a Customer Reference.
If the customer indicates an internal debit memo number, it can be captured here and passed to Trade Management.
17. Select an Activity.
The activity selected here drives the GL entries to account for the discrepancy between the cash received and the receivables amount. For example:

Receipt = \$10K
Total balance of multiple invoices that the is paying for is \$15K.
A non-transaction related deduction is created for \$5K.

The following accounting entries are created:

Debit Cash \$10K
Debit Claim Investigation Activity \$5K
Credit Receivables \$15K

18. Click Save.

Notice that a deduction number appears in the Reference Number field.

5.2.4.5 Creating an Overpayment

Due to the high volume of transactions going on between manufacturers and their customers, customers may make overpayments for various reasons. In such cases, Receivables can create overpayment claims in Trade Management.

Prerequisites

An overpayment.

Steps

Notes: As part of the cash application process, the Oracle Receivables user may need to perform additional data entry tasks.

These steps present only one way to enter a non-transaction related deduction.

1. Log on to Oracle Receivables and navigate to Receipts > Receipts.
2. In the Receipt Number field, enter a receipt number.
This number can be the customer check number or other reference number.
3. If necessary, change the Receipt Type to Cash.
4. If necessary, change the Currency Code.
5. Enter a Receipt Amount.
The amount the customer is paying.
6. If necessary, change the Receipt Date.
By default this is the current date.
7. If necessary, change the GL date.
By default this is the current date.

8. Select a Payment Method.
9. Under the Customer tab, enter the Customer Name.
The customer remitting the payment.
10. Optional. Enter a Reference and Comments.
This information is passed to Trade Management when the deduction is created.
11. Click Applications.
12. In the Apply To field, select Claim Investigation.
The available values are open transactions and some seeded receivables activities. Claim Investigation is seeded specifically to create non-transaction related overpayments (or deductions) in Trade Management.
13. In the Amount Applied field, enter the overpayment amount as a positive number.
14. In the Reference Type field, select Trade Management Claim if necessary.
15. In the Reference Reason field, select a reason.
The values available here are the same as in Trade Management.
16. Enter a Customer Reference.
17. Select an Activity.
The activity selected here drives the GL entries to account for the overpayment.
18. Click Save.
Notice that an overpayment number appears in the Reference Number field.

5.2.4.6 Reassigning Claim Owners Using Auto Assign Owner

If the Auto Assign Owner feature has been implemented, a claim owner is assigned automatically whenever a claim is created in Trade Management or in Oracle Receivables. Owner re-assignment is triggered by selecting the Auto Assign check box on the Claim Detail page.

For example, a claim with the reason Shipping was initially assigned to John. Upon investigation, John determines that the claim is really a Pricing Error. John changes the claim reason to Pricing Error. Because he is not sure who should be working on this claim, he checks the Auto Assign Owner box and clicks Update. The system assigns a new owner based on the new claim reason.

Prerequisites

- Assignment Manager must be implemented. See the *Oracle Marketing Implementation Guide* for instructions on implementing this feature.
- Territories have been set up for assignment purposes.

Steps

1. Navigate to Claim > Claims.
2. Select the claim number.
3. Select the Auto Assign Owner check box.
4. Click Update.

5.2.4.7 Adding Members to a Team

Besides the claim owner, a claim can have a team of people associated with it. The team members can access and update the claim. Assigning a team to a claim can speed the claim settlement process, and reduces the need for setting up numerous complex territories to handle individual business scenarios.

The table below explains the different access levels for claims, including deductions, overpayments, debit claims.

Table 5–12 Access Levels for Claims

Who	What They Can Do
Claim owner and team members	Update the claim details.
Task assignees	Update tasks from their calendar or task list. View the claim report.
All others in the same operating unit as the claim	Depending upon the person's responsibility, they will be able to: Update some claim details excluding the owner. View the claim report only.
All others not in the same operating unit as the claim	No access to the claim.

Prerequisites

None.

Steps

1. Navigate to Claim > Claims.
2. Select the claim number.
3. Navigate to Team.
4. To add a team member:
 - a. In the User/Role column, open the drop-down list and select User or Team.
 - b. In the Name column, click the search icon and select a user or team name.
5. To allow the new team member to edit metrics, select the Edit Metrics check box.
6. Click Update.

5.2.4.8 Updating Claim Detail Information

To edit claim detail information, the status of the claim must be New, Open or Complete. The Claim Detail page includes:

- Basic information such as the claim number, claim date, claim type, reason, action, owner and status.
- Customer information such as the customer name, account number, bill to address, and so on.
- Amount information including the claim amount both in its functional currency and transaction currency, and any exchange rate information between the two.
- Duplicate information that indicates whether or not this is a duplicate of another claim.
- Auto Assign Owner, which is a check box that allows you to reassign claim ownership automatically based on the claim reason.

To edit claim detail information, follow the steps below.

Prerequisites

An existing Claim with a status of New, Open or Complete.

Steps

1. Navigate to Claims. The Claims page appears.
2. Select the name of the claim you want to view. The Claim Detail page appears.

3. To change the Claim Type:
 - a. Delete the existing claim type and click the search icon.
 - b. Select a new claim type.
4. To change the Claim Date, click the calendar icon and select a new date.
5. To change the Due Date, click the calendar icon and select a new date.

The due date is populated automatically, and is calculated based on the set up of days due. Depending on how this application was implemented by your organization, you may not be able to modify this date.
6. To change the Reason:
 - a. Delete the existing reason and click the search icon.
 - b. Select a new reason.
7. To change the Action:
 - a. Delete the existing action, and click the search icon.
 - b. Select a new action.

The available actions depend upon the Reason selected. Selecting an Action creates specific Tasks for the claim.
8. To change the Owner, do one of the following:
 - Delete the existing owner, click the search icon, and select a new owner.
 - Select the Auto Assign Owner check box.

Selecting Auto Assign Owner instructs the system to automatically assign the claim owner. This functionality is present only if Assignment Manager is implemented.
9. To change the Status, open the drop-down list and select a new status.

The default status for new claims is New.
10. To mark a claim as a duplicate, or to change the duplicate claim number:
 - a. Delete the existing duplication claim number if one is present.
 - b. Click the search icon.
 - c. Select the duplicate claim from the Claim Selector window.

This functionality is present for claim and debit claim classes only.

11. To change the Customer

- a.** Delete the existing customer name, and click the search icon.
- b.** Select a new customer from the Customer Selector window.

Notice that the Number and Bill To fields are populated when the customer is selected.

12. To change the Bill To designation:

- a.** Delete the existing bill to information, and click the search icon.
- b.** Select a new location from the Location Selector window.

13. To change the Ship To designation:

- a.** Delete the existing ship to information, and click the search icon.
- b.** Select a new location from the Location Selector window.

14. To change the Contact:

- a.** Delete the existing contact name, and click the search icon.
- b.** Select a new contact from the Party Selector window.

15. To change the Broker:

- a.** Delete the existing broker information, and click the search icon.
- b.** Select a new broker from the Party Selector window.

No brokers are displayed if the customer does not have a broker relationship set up.

16. To change the Sales Rep:

- a.** Delete the existing sales rep, and click the search icon.
- b.** Select a new sales rep from the Sales Rep Selector window.

17. To change the Customer Reference number, enter a new value.

Customers will reference the claim with this number, which is typically the customer debit memo number.

18. To change the Customer Reference Date, open the calendar icon and select a new date.

This date is typically the customer debit memo date.

19. To change the Exchange Type, open the drop-down list and select a new value.

The Exchange Type, Rate, Currency and Amount fields are used when the Transaction and Accounted currencies are different. The value for this field must be User to perform an exchange rate conversion.

20. To change the Exchange Date, open the calendar icon and select a new date.

21. To change the Exchange Rate, enter a new value.

Example: If Sterling Pound is the currency type and 2 is the exchange rate, the value for Amount is converted at a rate of 2 Sterling Pounds:1 US dollar.

22. To change the Currency type, open the drop-down list and select a new value.

23. To change the Amount, enter a new value.

This value can be changed for claim and debit claim classes only. This chart displays the amount remaining on a parent claim as amounts are split off into child claims for settlement. The amount remaining is the current value of the claim.

24. If additional fields were added for your organization, modify them as appropriate.

25. To save your changes, click Update.

5.2.4.9 Creating Claim Lines

Claim lines are used to associate various offer types to a specific claim. From the claim lines page, you can access the Associate Earnings Summary page. Here you can see all of the offers applicable to the customer or buying group on the claim and its related accounts, including any outstanding (unpaid) promotional accruals. You can perform a search on the accruals by offer, customer, order, invoice and products, and so on.

Prerequisites

A claim with promotional earnings.

Steps

1. Navigate to Claim and select a claim number.
2. Navigate to Lines.
3. Optional. If the settlement method is known, do the following:
 - a. In the Settlement Method field, open the drop-down list and select a method.

- b. In the RMA Transaction Type field, click the search icon and select a type.
- c. In the Tax Code field, click the search icon and select a tax code.

The settlement method selected determines the tax codes you will see. If you selected Check or Contra Charge, you will see Oracle Payables Tax Codes. For all other methods, you will see Oracle Receivables Tax Codes. The Tax Code selected here is the default for all claim line items, unless it is overridden for an individual line.

4. Enter information for each line as follows:

- a. In the Type field, open the drop-down list and select a line type.

This field is the line type used to associate a claim to an offer or product.

- b. In the Name field, click the search icon and select a value.

What you see when you click the search icon is determined by the Type specified.

- c. In the Line/Product field, click the search icon and select a product.

Notice that the Price field now shows the unit price for the product.

- d. In the Quantity field, type the number of items purchased.

- e. In the UOM field, click the search icon and select a unit of measure if one is not already displayed.

If a product is chosen in the Line/Product field, this field defaults to the proper UOM for that product.

- f. To change the Tax Code for this particular line, delete the current tax code. Then click the search icon and select a new tax code.

5. When you are finished creating claim lines, click Update.

After clicking update, notice that a value is entered in the Amount field for each line you created.

What you can do next

- You can view the Claim Line Details page for a specific line by clicking the Details icon. From this page you can link promotional activities and documents such as orders, invoices and products for which claim is being paid to this claim line. See [Section 5.2.4.10, "Entering Detail Information for Claim Lines"](#) for further instructions.

- You can associate earnings with a claim line by clicking the search icon in the Associate Earnings column. See [Section 5.2.4.11, "Associating Earnings with Claim Lines"](#) for further instructions.

5.2.4.10 Entering Detail Information for Claim Lines

The claim line detail is used to associate promotional activities and documentation to the specified claim.

Prerequisites

An existing claim with completed claim lines.

Steps

1. Navigate to Claim and select a claim number.
2. Navigate to Lines.
3. Locate the line you want to add details for, and click the icon in the Detail column.
The Claim Line Detail page appears.
4. To indicate the claim is valid, select the Valid check box.
This check box has no functional impact.
5. To indicate that performance on the part of the customer has been verified, select the Performance Verified check box.
This check box is added as a note to the claim and has no functional impact.
6. To indicate that proof of performance has been attached to the Claim, select the Performance Attached check box.
This check box is added as a note to the claim and has no functional impact.
7. Select the promotional activity as follows:
 - a. Select an Activity Type from the drop-down list.
 - b. Select an Activity by clicking the search icon and selecting the activity name.
 - c. Select a schedule by clicking the search icon and selecting the schedule name.
8. Enter the appropriate documentation information as follows:

- a. Select a Class from the drop-down list.
- b. Select a Number by clicking the search icon and selecting a value.
This number is the reference number of the document.
- c. Select a Product Name by clicking the search icon and selecting a product.
Notice that the Part Number field is populated automatically if a Product Name is selected.
- d. Select a Line by clicking the search icon and selecting a value.
- e. Enter a Quantity if necessary.
If a quantity was entered on the Lines page, this field is automatically populated.
- f. Select a UOM if necessary.
UOM is populated automatically if a UOM was selected on the Lines page.
- g. Enter a Price if necessary.
Price is populated automatically if a price was entered on the Lines page.
9. Verify the information in the Amount section.
Claim Currency Amount is the amount shown in the Claim currency regardless of the promotional activity currency.
10. Select a Tax Code if necessary by clicking the search icon and selecting the appropriate code.
Tax Code is populated automatically if a Tax Code was selected on the Lines page.
11. In the Comments box, type any additional comments you have regarding the claim line details.
12. Click Update.

What you can do next

- Return to the Lines page by clicking Lines Summary.
- Associate earnings with the claim line by clicking Associate Earnings. See [Section 5.2.4.11, "Associating Earnings with Claim Lines"](#) for further information and instructions.

5.2.4.11 Associating Earnings with Claim Lines

Use Associate Earnings to associate a claim line with earnings accrued in the checkbook. Associating earnings is mandatory for promotional claim types.

Two procedures are presented for associating earnings with claims. The first procedure lists the steps for searching promotional accrual information. The second procedure provides instructions for associating earnings with the accrual information.

Prerequisites

A claim with completed Claim Lines.

Steps for searching promotional accrual information

1. Navigate to Claim and select a claim number.
2. Navigate to Lines.
3. In the Associate Earnings column, click the search icon for the appropriate line.
The Associate Earnings Summary page appears.
4. In the Accruals Search Criteria section of the page, enter search criteria in one or more of the fields. The fields are described below.
 - Relationship and Related Customer. These field reflect account relationships set up in TCA. A customer account may be handling the invoices, billing, and deductions for a related customer account. Select a value from the Relationship drop-down list; then click the search icon for the Related Customer field and select a customer.
 - Buying Group and Display Children. By selecting a buying group and the Display Children check box, you can search for the accruals for that particular buying group and its members.
 - Activity Type, Activity, and Schedule. Use these fields to search for a particular offer and its accruals. Alternatively, you can search by campaign schedule to find its related offers and accruals.
 - Document Class and Document Number. Use these fields to search for accrual records for specific document types, such as orders and invoices.
 - Product. Use this field to search for the accrual records for a specific product.
 - Summary View. Use this field to specify an Activity, Document Class or Product view.

- Performance Verified. Select this check box to indicate that you have verified the customer or buying group has met the performance criteria for a promotion.

5. Click Search.

The results are displayed below the search criteria. Continue to Steps for associating earnings below.

Steps for associating earnings

1. In the Line Amount field, type a value.
2. If you have a scan data promotion, enter the actual scan data units and values in the Scan Promotion Accruals table.
3. Click Update.
4. To return to the Lines page, click Line Summary.

Notice that the Associate Earnings icon has changed to a check mark.

5.2.4.12 Viewing the 360 Customer View

Trade Management allows you to see a 360 View for every customer. This view lists all of the transactions for a given customer, such as orders, invoices, debit memos and chargebacks. You can view the details of each transaction.

Prerequisites

None.

Steps

1. Navigate to Audience > Organization.
2. In the Saved Searches field, select a search and click Search.
3. Select the customer name.
4. Navigate to 360 View.
5. Use the links under 360 View to locate the types of transactions you want to view.

5.2.4.13 Working with Discoverer

The Discoverer tool can be opened from Trade Management. Depending upon how Discoverer is implemented for your organization, it can be used as either:

- A query tool that allows you to extract all customer or other information from the database by creating and using workbooks.
- A page with pre-defined reports that you select to run and refresh whenever the reports need to be updated.

About Discoverer Workbooks

Workbook formats include:

- Simple table (data displayed in columns)
- Cross tab (data displayed in rows and columns)
- Page-detail table (data are displayed in columns are grouped by items on page axis)
- Page-detail cross tab formats (data displayed in both rows and columns and are grouped by items on page axis)

The information you can access using Discoverer depends on the business areas and folders you have been given access to. Claims users are typically given access to the Oracle Marketing business area and the Claim Research folder. The seeded folder makes the following information available:

- Returns
- Order Headers
- Order Line Details
- Checks
- Invoice Payments
- Deductions
- Receivable Transactions
- Payables Invoices

Discoverer supports many functions for users to manipulate their reports. These functions include filtering by conditions, sorting, calculations and functions (such as sum, average, count, minimum and maximum, standard deviation and variance). Advanced features include graphing and scheduling.

A workbook can be saved in the database or exported as an HTML report or Excel file.

Prerequisites

None.

Steps

1. Navigate to Claim > Research.
2. Do one of the following:
 - If the Create/Open Workbook window appears, click Create a new workbook or Open an existing workbook as appropriate.
 - If report workbooks appear, click the appropriate workbook to refresh the report.

For more information on working with Discoverer, refer to the Oracle Discoverer documentation.

5.2.4.14 Creating Tasks

Tasks provide you with a project management tool to coordinate the various actions required to settle claims. When a claim is created, default tasks for that particular claim type may be created automatically. From this point, you can create additional tasks and update existing tasks.

Tasks can be assigned to other individuals or team members. Assignees receive notification informing them of their tasks.

Both the scheduled time and the actual completion time can be tracked for each task. Tasks can be classified by task type. Notes and attachments can be recorded with each task, and the status of a task can be tracked.

Prerequisites

A claim (or deduction, overpayment, or debit claim) has been created.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Tasks.

4. To create a task, click Create.
The Create Task page appears.
5. In the Type field, open the drop-down list and select the type of task you want to create.
6. In the Name field, type a name for the task.
7. Optional. In the Description field, type a description of the task.
Include any information necessary to complete the task which is not entered in the other fields.
8. Optional. In the Priority field, open the drop-down list and select a priority.
9. Optional. In the Category field, open the drop-down list and select a category.
Categories allow you to classify tasks. To set up categories, navigate to Profile > Calendar > Categories.
10. Optional. If the task is private, select the Private check box.
11. Optional. In the Parent field, select a parent task if this is a child task by clicking Go and selecting a task.
12. Optional. To notify the assignee of the task, select the Notify check box.
13. Optional. In the Time Zone field, open the drop-down list and select a time zone.
14. Enter start and end dates and times for the task as follows:
 - a. Select Planned, Scheduled or Actual.
 - b. Click the calendar icons and select a date or time for Start Date, Start Time, End Date, and End Time.
15. Complete each line of the Assign To table as follows:
 - a. To display the task on the individual's calendar, select the Display on Calendar check box.
 - b. To select a Resource Type, click Go and select a type.
 - c. To select the Name of the individual, click Go and select the name.
Notice that the Role is filled in automatically.
 - d. If desired, type the Job Title, Phone, and E-mail address of the assignee in the appropriate columns.

16. Optional. Complete the Customer section as follows:

- a. Select a Customer Type by opening the drop-down list and selecting a value.
- b. Select an Account by clicking Go and selecting an account from the list.
- c. Select a Name by clicking Go and selecting a customer name from the list.
- d. Select a primary in the Address1 field by clicking Go.
- e. Type a value in the Number field.
- f. Type a secondary address in the Address2 field.
- g. Select a Phone Number by clicking Go and selecting a value from the list.
- h. Type an e-mail address in the E-mail field.

17. Optional. Enter any Reference Information as follows:

- a. To select a type, open the Type drop-down list and select a value.
The values are set up by your system administrator and can be used to classify references.
- b. Select a Name by clicking Go and selecting a value from the list.
- c. Enter a short description of the reference in the Description field.

18. Do one of the following:

- Click Create to create the task
- Click Create and Create Another to create the current task and immediately create another task.

Note: To generate additional table lines, populate all available lines and click Create or Update.

5.2.4.15 Updating and Removing Tasks

Existing tasks can be updated or removed. Depending upon the information you want to change, tasks can be updated from the Task Summary page or the Task Details page.

Prerequisites

A task must exist.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Tasks.
The Tasks page appears.
4. Do one of the following:
 - To remove a task, select the corresponding check box in the Remove column, and click Update.
 - To update information in the Tasks Summary section of the page, modify the fields as necessary, and click Update.
 - To update other task details, click the task number or the details icon. The Task Details page appears. Change the information on this page as necessary, and click Update.

5.2.4.16 Viewing Tasks

The Tasks displayed are based upon the action selected. Refer to the action section in Claim Research to see how tasks change when the action changes. The Tasks Summary list can be sorted and selected by modifying some or all of the parameters shown in the middle of the page.

Prerequisites

An existing claim.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Tasks.
The Tasks page appears.
4. Open the View drop-down list and select a view.
5. To filter the list of tasks, enter or select values for the Date Range, Type, Priority, Status and Include Private.
6. Click Apply.

Tasks are displayed with the following information. The list of tasks in the Tasks Summary is sortable by any of the columns noted below, with the exception of the Owner Type.

- Number of the Task
- Name of the Task
- Type
- Status
- Priority
- Planned Start Date
- Planned End Date
- Owner Type
- Owner

5.2.4.17 Splitting Claims

A single claim can be split into multiple smaller claims. Claims may be split because:

- The claim has multiple reasons.
- The claim is only partially valid. In this case, some part of the claim might be a credit, while other parts must be charged back or held over for further investigation.

Split claims share the same master claim number, with the addition of a suffix identifier. During the split, the system displays a running total of the amount assigned to the new claims, as well as the claim balance. If the entire amount of the claim is not allocated to the split claims, the system assumes you are doing a partial split, and the unassigned balance remains on the original (*parent*) claim. The status of a parent claim is changed to Cancelled if you split it into child claims that total the amount of the parent.

Prerequisites

- A claim (including deductions, overpayments and debit claims) exists.
- The status of the claim is Open.

Steps

1. Navigate to Claim > Claims.
2. Select the name of the claim.
The Claim Details page appears.
3. Navigate to Split.
4. Enter the information for each split claim on a row in the table as follows:
 - a. Optional. Select a Claim Type for the by clicking the search icon and selecting a type from the Claim Type Selector window.
If no selection is made, the type defaults to the parent type.
 - b. Optional. Select a Reason by clicking the search icon and selecting a reason from the Reason Selector window
If no selection is made, the reason defaults to the parent reason.
 - c. In the Amount column, type an amount for the split claim.
 - d. Select a Line Amount by clicking the search icon and selecting a line amount if the claim has:
 - Multiple line amounts
 - A single line that is for less than the total claim amount.You must explicitly assign line amounts to be split along with the claim. See [Rules for Splitting Claims with Claim Lines](#) below for more information.
5. Click Update to save the information and generate new claims.

Rules for Splitting Claims with Claim Lines

The following guidelines and examples will help you split claims with claim lines.

For the application to automatically split a line, the line amount must be for the full amount of the claim. In this example, the line is for less than the full amount; therefore, you must manually assign the line amount to the split claims.

Example: Assume the total amount of a claim is \$400.

- If no claim lines, the claim can be split any way as long as the amounts still total \$400.
- If one claim line for \$300, you could split the claim as follows:

- Into two claims where Claim 1 = \$350 and includes the claim line for \$300, and Claim 2 = \$50 and has no claim line.
 - Into two claims where Claim 1 = \$60 and has no claim line, and Claim 2 = \$340 and includes the claim line for \$300.
- If one Claim line for \$400 (the claim total), you can split claim line automatically as follows:
 - Into two claims where Claim 1 = \$300 with a claim line of amount \$300 and Claim 2 = \$100 with a claim line of amount \$100. You can do this by just giving the split claim amount \$300 and \$100 from the UI. You can not use this functionality if the claim line is associated with earnings already. In that case, you need to manually adjust the association and split claim line first.
 - Into two claims, where Claim 1 = \$0 and has no claim line, and Claim 2 = \$400 and includes the claim line for \$400.
- If you have multiple claim lines whose sum is less than the total claim amount (for example Line 1 = \$300 and Line 2 = \$40), you could split the claim as follows:
 - Into two claims where Claim 1 = \$380 and includes Line 1 for \$300 and Line 2 for \$40. Claim 2 = \$20 and has no claim lines.
 - Into two claims where Claim 1 = \$350 and includes Line 1 for \$300, and Claim 2 = \$50 and includes Line 2 for \$40.
 - Into two claims where Claim 1 = \$30 and has no claim line, and Claim 2 = \$370 and includes Line 1 for \$300 and Line 2 for \$40.
- If you have multiple claim lines whose sum equals the total claim amount (for example Line 1 = \$300 and Line 2 = \$100), you could split the claim as follows:
 - Into two claims where Claim 1 = \$100 and includes Line 2, and Claim 2 = \$300 and includes Line 1.

5.2.4.18 Adding an Attachment to a Claim

You can add attachments to a claim. Attachments can be a file or a URL sent by a customer as proof of performance.

Prerequisites

An existing claim.

Steps

1. Navigate to Claim > Claims.
2. Select the claim number.
3. Navigate to Attachments.
The Claim Details - Attachments page appears.
4. Click Create.
5. In the Description field, enter a description of the attachment.
6. Select the type of attachment by choosing the Text, File or URL button.
7. Do one of the following:
 - If you selected text, type the contents of the attachment in the text field.
 - If you selected File, click Browse, locate the file, select the file name, and click Open.
 - If you select URL, enter a web site address.
8. Click Create.

5.2.4.19 Editing Attachments

Use this procedure to edit an existing attachment to a claim.

Prerequisites

An existing claim with an attachment.

Steps

1. Navigate to Claim > Claims.
2. Select the claim number.
3. Navigate to Attachments.
4. Click the Description to display the Attachment Details page.
5. Modify the attachment as desired.
6. Click Update.
7. When you are finished, click the claim number to return to the Claim Detail page or another navigation link.

5.2.4.20 Creating Notes

You can add as many notes and attachments to notes as necessary to fully document a claim. Follow the procedures below to add Notes and Attachments to a claim. See the *Oracle Foundation Concepts and Procedures Guide* for further information on notes and attachments.

Prerequisites

An existing claim (or deduction, overpayment, or debit claim).

Steps

Note: Once a Note is added, you cannot modify the text of the note, or any additional text. Review your note carefully before clicking Create.

1. Navigate to Claim > Claims.
2. Select a claim number.
3. Navigate to Notes.
The Claim Details - Notes page appears.
4. Click Create.
5. In the Type field, open the drop-down list and select the type of note you want to create.
6. In the Status field, open the drop-down list and select a status.
Note statuses are defined as follows:
 - Private. Only you can view the note.
 - Public. Everyone can read the note.
 - Publish. Publishable over the internet. Everyone can view it.
7. If necessary, enter additional text by clicking More and typing in the window that appears.
8. Do one of the following:
 - Click Create to save the note and return to the Claim Details - Notes page.

- Click Create and Create Another to save the note and immediately create another note.
- 9. To add an attachment to a note, click the corresponding attachment icon in the Attachment column.
- 10. Click Add Attachment.
- 11. In the Description field, enter a description of the attachment.
- 12. Select the type of attachment by choosing the Text, File or URL button.
- 13. Do one of the following:
 - If you selected text, type the contents of the attachment in the text field.
 - If you selected File, click Browse, locate the file, select the file name, and click Open.
 - If you select URL, enter a web site address.
- 14. Click Create.

5.2.4.21 Viewing and Editing Notes

Use this procedure to view or edit Notes.

Prerequisites

An existing claim with one or more Notes.

Steps

1. Navigate to Claim > Claims.
2. Select a claim number.
3. Navigate to Notes.

The Claim Details - Notes page appears.
4. To view notes, you can:
 - Click the corresponding link in the Note column to display the Claim Details - Notes Details page.
 - Filter the list of notes by selecting a value for one or more of the filters: Then click Apply to display the selected Notes.
5. To edit a note:

- a. Click the link in the Note column.
- b. Edit the Note Type or Status.

These two fields are the only editable fields for a Note.

- c. Do one of the following:
 - Click Update to save your changes and return to the Claim Details - Notes page.
 - Click Relate To to go to the Relate To page. Here you can relate the note to another claim; or remove it from a claim.
 - To add an attachment to the note, click Add Attachment. See [Section 5.2.4.18, "Adding an Attachment to a Claim"](#) for further information.

5.2.4.22 Viewing Related Documents

Related Documents automatically searches for other claims which are possible duplicates of the claim you are investigating. The search is based on:

- Similar customer debit memo numbers. The search automatically identifies similarities, such as a zero and the letter O, the number 1 and the letters I and l. It also checks for the presence or absence of prefixes such as DM123 and 123.
- Same invoice numbers (for invoice-related or transaction-related deductions).

Prerequisites

A claim (or deduction, overpayment, or debit claim) has been created.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Related Documents.

The search starts automatically and any related documents found are displayed. From here you can view the details of any related claim.

5.2.4.23 Viewing Source

Source displays the Oracle Receivables receipt and transaction information that originally created a deduction or overpayment. Source can help you refer back to documents in Oracle Receivables.

Prerequisites

A deduction or overpayment has been created.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Source.

The following data are displayed:

Receipt. The record created in Oracle Receivables when a company receives a customer payment.

Receipt Date. The date the payment is received.

Receipt Amount. The amount the customer is paying.

Currency Code. The currency in which the customer is paying.

Receipt Reference. This may be any reference information.

Receipt Comments. This may be any comments entered by the Oracle Receivables clerk.

Source Type. This only displays for a transaction related deduction. Values are invoice, debit memo and chargeback.

Source Number. This only displays for a transaction related deduction. This is the number of the transaction – invoice, debit memo or chargeback.

Source Date. This only displays for a transaction related deduction. This is the date of the transaction.

Source Amount. This only displays for a transaction related deduction. This is the amount of the transaction.

5.2.4.24 Viewing the History of a Claim

The history of a claim is a snapshot of all of the changes that have occurred to the claim up to the time you view the history. The history captures data from these pages:

- Details
- Lines
- Line Details
- Tasks
- Settlement

Prerequisites

A claim exists.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to History.
4. To view an event (change) in more detail, click the corresponding name in the Events column.
5. To view more information about a particular event, click one of the links in the side navigation bar.

When you click one of the links in the side navigation bar, you see historical information captured from the corresponding details page. The links in the side navigation bar are:

- Main
- Lines
- Tasks
- Settlement
- History
- Report

5.2.4.25 Settling All Claims for Related Customer Accounts

Customer accounts can be set up with relationships. Common relationships include bill to and ship to.

For example, the headquarters of an organization may be set up as the bill to account and location for multiple retail stores. Each retail store can be set up as a ship to account and location. In addition, the headquarters office may be handling all of the claims for the retail stores, but the retail stores may ultimately receive their payment directly.

Prerequisites

- An existing claim with a status of Open or Complete.

Note: For release 11.5.9, Claims can be settled for related customer accounts with On Account Credit Memo or Debit Memo only.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Settlement.
4. Select the Pay Related Customer check box.
5. Select the Relationship Type (parent, reciprocal, or all).
6. Select the Related Customer.
7. Select the Related Site.
8. As required, complete any additional fields on the Claim Settlement page.
9. Click Request Approval.

The Preview Approval page appears.

10. If you are ready to settle the claim, click Confirm.

5.2.4.26 Settling Promotional Claims for Buying Groups

Follow the steps below to settle promotional claims for buying groups.

Prerequisites

- Buying groups and members must be set up.
- A promotional claim for a buying group with a status of Open or Complete.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Create lines as necessary.

Refer to [Section 5.2.4.9, "Creating Claim Lines"](#) for more information.

5. Click Update.
6. Click the corresponding Associate Earnings icon.
7. Select a Buying Group.

The values that are available depend upon where the customer is in the buying group hierarchy. See the buying group hierarchy example below for more information.

8. Select Display Children.

The accruals for the buying group members are displayed.

9. Proceed to associate earnings.
10. When finished with associate earnings, navigate to Settlement.
11. Select Credit Memo - On Account as settlement method.
12. As required, complete any additional fields on the Claim Settlement page.
13. Click Request Approval.

The Preview Approval page appears.

14. If you are ready to settle the claim, click Confirm.

5.2.4.27 Settling Claims and Deductions with an On Account Credit Memo

You can use an *on account credit memo* to settle a claim or deduction. The claim or deduction does not have to be related to a promotion. Deductions can or cannot be transaction-related.

Prerequisites

- An existing claim or deduction with a status of Open or Complete.
- Oracle Receivables has been set up.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select Credit Memo - On Account.
5. Optional. If necessary, select a tax code by clicking the search icon and selecting a value.
6. Verify that at least one claim line with a positive value exists.

If a claim line does not exist, create one now. Refer to [Section 5.2.4.9, "Creating Claim Lines"](#) for instructions.

The sum of the claim lines can be less than the total claim amount, because taxes will be added. For example, you have a claim for \$1000, but the claim lines total \$950. When the credit memo is created, \$90 in taxes is added, thus creating a credit memo for \$1040. The claim is settled for \$1000.

The difference of \$40 is compared to your write-off threshold. If the difference is less than the threshold, it is written off. If the difference is more than the threshold, a split claim for \$40 is created.

7. Optional. If products are entered on the lines, enter a quantity, UOM and price. All of this information is passed to the credit memo.
8. Optional. Check to see if earnings have been associated to the claim line.
You will see a check mark in the Associate Earnings column.
9. Navigate to Settlement.
10. As required, complete any additional fields on the Claim Settlement page.

11. Click Request Approval.

The Preview Approval page appears.

12. If you are ready to settle the claim, click Confirm.

5.2.4.28 Settling Deductions with a Previous Credit Memo

You can use an existing credit memo to settle a deduction. The credit memo might already exist because of a previous RMA, or perhaps as a result of data imported from third party or legacy systems. The deduction can or cannot be transaction-related.

Prerequisites

- A deduction with the status of Open or Completed.
- An existing credit memo that can be used to settle the deduction.
- Oracle Receivables has been set up.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select Credit Memo - On Account.
5. Verify that at least one claim line with a positive value exists.
If a claim line does not exist, create one now. The sum of the claim lines must equal the total claim amount.
6. Navigate to Settlement.
7. In the Previous Open Credit Memo field, click the search icon and select a credit memo with a large enough balance to offset the deduction.
Use the following to search for the credit memo: transaction number, transaction type, location, source, or reference.
Notice that you can see the balance due, GL date, and transaction dates for the credit memos.
8. As required, complete any additional fields on the Claim Settlement page.

9. Click Request Approval.

The Preview Approval page appears.

10. If you are ready to settle the claim, click Confirm.

5.2.4.29 Settling Deductions with an Invoice Credit or Invoice Line Credit

Invoice Credit

Invoice credits reduce the balance of an invoice, whereas an on account credit memo reduces the customer balance. You can use an invoice credit to settle a deduction whether it is transaction-related or not. Currently, an invoice credit cannot be used to settle a promotion-related deduction. Use an on account credit memo for this purpose.

Invoice Line Credit

You can use an invoice line credit to settle a transaction-related deduction that occurred because of a reason that can be traced back to a particular invoice line item. The deduction cannot be promotion related.

Prerequisites

Oracle Receivables has been set up.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select Credit Memo - Invoice.

The tax code used is the one used on the invoice.

5. If this is an invoice credit, then verify that an invoice number is entered in a claim line. Otherwise, proceed to the next step.

If not, create the claim line now. For a transaction-related deduction, this invoice number must be the same as the one on which the deduction was created. For a non-transaction-related deduction, this invoice number must be on the same receipt as the deduction. If the invoice numbers do not match, the settlement is not automated. Instead, a manual settlement workflow is initiated and notification is sent to any Oracle Receivables user with the Receivables Role responsibility.

6. If this is an invoice line credit, then:
 - a. Verify that an invoice number is entered in a claim line.
 - b. Verify that the invoice line is selected.Multiple invoice lines can be entered, each as a separate claim line.
7. Verify that the line amount is a positive value.

The sum of the claim line amounts must equal the total claim amount.
8. Navigate to Settlement.
9. As required, complete any additional fields on the Claim Settlement page.
10. Click Request Approval.

The Preview Approval page appears.
11. If you are ready to settle the claim, click Confirm.

5.2.4.30 Settling Deductions with an Invoice Tax Only Credit

You can use a tax only credit to settle a deduction that occurred because of tax calculation errors. The deduction can be transaction-related; it cannot be related to a promotion.

Prerequisites

Oracle Receivables has been set up.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select Credit Memo - Invoice.
5. Verify that an invoice number is entered in a claim line. If not, select an invoice number now.
6. Go to the Line Details page, open the Credit To drop-down list, and select Tax.

For a transaction-related deduction, this invoice number must be the same as the one on which the deduction was created. If it is not, the settlement process is not automated. A manual settlement workflow is initiated and notification is sent to any Oracle Receivables user with the Receivables Role responsibility.

7. Verify that the line amount is a positive value.
The sum of the claim line amounts must equal the total claim amount.
8. Navigate to Settlement.
9. In the Previous Open Credit Memo field, click the search icon and select a credit memo with a large enough balance to offset the deduction.
Use the following to search for the credit memo: transaction number, transaction type, location, source, or reference.
Notice that you can see the balance due, GL date, and transaction dates for the credit memos.
10. As required, complete any additional fields on the Claim Settlement page.
11. Click Request Approval.
The Preview Approval page appears.
12. If you are ready to settle the claim, click Confirm.

5.2.4.31 Settling Deductions with a Chargeback

If you determine that a deduction is not valid, you can charge the customer back. For a transaction-related deduction, the customer on the original transaction is charged. For non-transaction related deductions, the customer on the receipt is charged back.

Prerequisites

Oracle Receivables has been set up.

Steps

Note: The tax code is not used or passed by Trade Management.

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select Chargeback.
5. Verify that at least one claim line with a positive value exists.

The sum of the claim line amounts must equal the total claim amount.

6. Navigate to Settlement.
7. As required, complete any additional fields on the Claim Settlement page.
8. Click Request Approval.

The Preview Approval page appears.

9. If you are ready to settle the claim, click Confirm.

5.2.4.32 Settling Deductions with a Write Off

When a deduction is so small that your organization does not want to spend time and resources researching it, or if it cannot be collected, you can settle the deduction using a write off.

Currently, the deduction must be transaction-related for the write off settlement to be automated. In the deduction is non transaction-related, a settlement workflow notification is sent to Oracle Receivables. The Oracle Receivables individual must create some form of adjustment. When complete, the Oracle Receivables individual updates the notification with the adjustment record, and the deduction closed in Trade Management.

Prerequisites

Oracle Receivables has been set up.

Steps

Note: The tax code is not used or passed by Trade Management.

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select Write Off.
5. Verify that at least one claim line with a positive value exists.

If a claim line does not exist, create one now. The sum of the claim lines must equal the total claim amount.

6. Navigate to Settlement.

7. As required, complete any additional fields on the Claim Settlement page.
8. Click Request Approval.
The Preview Approval page appears.
9. If you are ready to settle the claim, click Confirm.

5.2.4.33 Settling Deductions with a Return Materials Authorization

When a customer returns product, you can use the RMA settlement method in Trade Management to settle the deduction. When the return is processed and a credit memo is generated, Trade Management automatically tracks the credit memo and uses it to close the deduction.

Prerequisites

Order Management and Oracle Receivables has been set up.

Steps

Note: The tax code is not used or passed by Trade Management.

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select RMA.
5. In the RMA Transaction Type field, click the search icon and select a value.
The RMA transaction types are set up with return order workflows which drive all of the processes that the return order must go through.
6. Verify that at least one claim line with a positive value exists.
If a claim line does not exist, create one now.

The sum of the claim lines can be less than the total claim amount, because taxes will be added. For example, you have a claim for \$1000, but the claim lines total \$950. When the credit memo is created, \$90 in taxes is added, thus creating a credit memo for \$1040. The claim is settled for \$1000.

The difference of \$40 is compared to your write-off threshold. If the difference is less than the threshold, it is written off. If the difference is more than the threshold, a split claim for \$40 is created.

7. Select or type values as appropriate for the Line/Product, Quantity, UOM and Price fields.
8. Navigate to Settlement.
9. As required, complete any additional fields on the Claim Settlement page.
10. Click Request Approval.

The Preview Approval page appears.

11. If you are ready to settle the claim, click Confirm.

5.2.4.34 Settling a Claim with a Contra Charge

A contra charge is a European-specific settlement whereby if a customer has balances in Oracle Receivables as well as Oracle Payables, these balances can be offset by the deduction settlement.

Prerequisites

Oracle Receivables and Oracle Payables have been set up.

Steps

Note: The tax code is not used or passed by Trade Management.

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select Contra Charge.
5. Verify that at least one claim line with a positive value exists.

If a claim line does not exist, create one now. The sum of the claim lines must equal the total claim amount.

6. Navigate to Settlement.
7. As required, complete any additional fields on the Claim Settlement page.

8. Click Request Approval.

The Preview Approval page appears.

9. If you are ready to settle the claim, click Confirm.

5.2.4.35 Settling Overpayments with a Receipt Write Off

You can settle an overpayment using a receipt write off for many reasons, such as:

- The amount is so small that your organization feels it can write the expense off.
- The customer received extra product and decided to keep them, thus overpaying the invoice.

Prerequisites

Oracle Receivables and Oracle Payables have been set up.

Steps

Note: The tax code is not used or passed by Trade Management.

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select Write Off.
5. Verify that at least one claim line with a negative value exists.
If a claim line does not exist, create one now. The sum of the claim lines must equal the total claim amount.
6. Navigate to Settlement.
7. As required, complete any additional fields on the Claim Settlement page.
8. Click Request Approval.
The Preview Approval page appears.
9. If you are ready to settle the claim, click Confirm.

5.2.4.36 Settling Overpayments with a Debit Memo

You might use a debit memo to settle an overpayment for various reasons. For example, a customer took a deduction that was not valid, but was still issued a credit. Later, the customer decides to pay back the credit. This payment results in an overpayment claim that can be settled with a debit memo.

Prerequisites

Oracle Receivables has been set up.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select Debit Memo.
5. Optional. If necessary, select a tax code by clicking the search icon and selecting a value.
6. Verify that at least one claim line with a negative value exists.

If a claim line does not exist, create one now.

Because taxes will be added, the sum of the claim lines can be less than the total amount of the claim. For example, we have a claim for <\$1000>. The claim lines total <\$950>. When the debit memo is created, \$90 in taxes is added, thus creating a debit memo for <\$1040>. The claim is settled for <\$1000>.

The difference of \$40 is compared to your write-off threshold. If the difference is less than the threshold, it is written off. If the difference is more than the threshold, a split claim for \$40 is created.

7. Optional. If products are entered on the lines, enter a quantity, UOM and price. All of this information is passed to the debit memo.
8. Optional. Check to see if earnings have been associated to the claim line.
You will see a check mark in the Associate Earnings column. For a debit claim, the Associate Earnings page will display negative accruals.
9. Navigate to Settlement.
10. As required, complete any additional fields on the Claim Settlement page.
11. Click Request Approval.

The Preview Approval page appears.

12. If you are ready to settle the claim, click Confirm.

5.2.4.37 Settling Claims with a Check

You can issue a check to settle a claim.

Prerequisites

A claim with the status of Open or Completed.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select Check.
5. Optional. If necessary, select a tax code by clicking the search icon and selecting a value.
6. Verify that at least one claim line with a positive value exists.

If a claim line does not exist, create one now. Refer to [Section 5.2.4.9, "Creating Claim Lines"](#) for instructions.

Because taxes will be added, the sum of the claim lines can be less than the total amount of the claim.

7. Optional. Check to see if earnings have been associated to the claim line.
You will see a check mark in the Associate Earnings column.
8. Navigate to Settlement.
9. As required, complete any additional fields on the Claim Settlement page.
10. Click Request Approval.

The Preview Approval page appears.

11. If you are ready to settle the claim, click Confirm.

5.2.4.38 Settling Debit Claims and Overpayments with a Debit Memo

To settle a debit claim, you must issue a debit memo. You can also settle an overpayment with a debit memo.

Prerequisites

- A debit claim or overpayment with the status of Open or Completed.
- Oracle Receivables has been set up.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select Debit Memo.
5. Optional. If necessary, select a tax code by clicking the search icon and selecting a value.
6. Verify that at least one claim line with a negative value exists.

If a claim line does not exist, create one now.

Because taxes will be added, the sum of the claim lines can be less than the total amount of the claim. For example, we have a claim for <\$1000>. The claim lines total <\$950>. When the debit memo is created, \$90 in taxes is added, thus creating a debit memo for <\$1040>. The claim is settled for <\$1000>.

The difference of \$40 is compared to your write-off threshold. If the difference is less than the threshold, it is written off. If the difference is more than the threshold, a split claim for \$40 is created.

7. Optional. If products are entered on the lines, enter a quantity, UOM and price. All of this information is passed to the debit memo.
8. Optional. Check to see if earnings have been associated to the claim line.
You will see a check mark in the Associate Earnings column. For a debit claim, the Associate Earnings page will display negative accruals.
9. Navigate to Settlement.
10. As required, complete any additional fields on the Claim Settlement page.
11. Click Request Approval.

The Preview Approval page appears.

12. If you are ready to settle the claim, click Confirm.

5.2.4.39 Settling Overpayments with a Previous Debit Memo

You can use a debit memo to settle an overpayment claim. In certain cases, a debit memo may already exist, perhaps because of data imported for third party or legacy systems. In these cases, you can use the open debit memo for settlement rather than creating a new one.

Prerequisites

- An overpayment with the status of Open or Completed.
- Oracle Receivables has been set up.

Steps

Note: The tax code is not used or passed by Trade Management.

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select Debit Memo.
5. Verify that at least one claim line with a negative value exists.
If a claim line does not exist, create one now. The sum of the claim lines must equal the total claim amount.
6. Navigate to Settlement.
7. In the Previous Open Debit Memo field, click the search icon and select a debit memo with a large enough balance to offset the overpayment.
Use the following to search for the credit memo: transaction number, transaction type, location, source, or reference.
Notice that you can see the balance due, GL date, and transaction dates for the credit memos.
8. As required, complete any additional fields on the Claim Settlement page.

9. Click Request Approval.

The Preview Approval page appears.

10. If you are ready to settle the claim, click Confirm.

5.2.4.40 Settling Overpayments with an On Account Cash Application

When a customer has overpaid for various reasons, the overpayment can be placed on account. The overpayment amount can be applied to the customer's transactions.

Prerequisites

- An overpayment with the status of Open or Completed.
- Oracle Receivables has been set up.

Steps

Note: The tax code is not used or passed by Trade Management.

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Lines.
4. Open the Settlement Method drop-down list and select On Account Credit.
5. Verify that at least one claim line with a negative value exists.
If a claim line does not exist, create one now. The sum of the claim lines must equal the total claim amount.
6. Navigate to Settlement.
7. As required, complete any additional fields on the Claim Settlement page.
8. Click Request Approval.
The Preview Approval page appears.
9. If you are ready to settle the claim, click Confirm.

5.2.4.41 Viewing Claim Reports

A claim report is a one page summary of the essential details of a claim. The report can be printed.

Prerequisites

A claim, deduction, overpayment or debit claim must exist.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
3. Navigate to Report.

5.2.4.42 Viewing the Claims Aging View

The claim aging view summarizes claims and deductions by customer and by days due. Here you can see which customer has the most outstanding claims and who has had outstanding claims for the longest time. Aging buckets can be configured in Oracle Receivables for claims and deduction purposes.

Prerequisites

- Aging Buckets have to be setup in Oracle Receivables.
- AMS-TM: Claim Aging Populating concurrent program needs to be run periodically in order to refresh the Claim Aging View.

Steps

1. Navigate to Claim > Claims Aging.
2. Click any of the links in the Current, Past Due and Total columns to see more information.

5.2.4.43 Viewing Claim History Details

Use this procedure to view the details history of a claim.

Prerequisites

An existing claim.

Steps

1. Navigate to Claim > Claims.
2. Select the claim name.
If the appropriate claim is not listed, use Quick Find or Personalized Search to locate the claim. The Claim Details page appears.
3. Click the History item on the side navigation to display the list of historic events for the Claim. Each event is listed with the Date, Currency, Amount, Customer, Reason, Owner, Status and Due Date.
4. Click the link in the Events column to see the detail for the selected Event. The two choices are New and Change.
5. The Details page displays the following fields. These fields cannot be modified.

Claim Number	Claim Type	Event	Date of the Event
Description of the Event		Claim Date	Due Date
Action	Owner	Status	Reason
Customer Name	Customer Number	Bill To Address	Ship To Address
Customer Contact	Broker	Sales Rep	Context Value
Whether the claim is a duplicate		Exchange Date	Exchange Type
Customer Reference Number		Transaction Currency	
Customer Reference Date		Transaction Amount	

6. Click the History item on the side navigation to return to the History Summary Page.

5.2.4.44 Viewing Claim History Lines

Use this procedure to view the lines history of a claim.

Prerequisites

An existing claim.

Steps

1. Select a claim as show in steps 1-5 of Viewing Claim History Details.
2. Click the Lines item on the side navigation.
3. The Lines History page displays the following:
 - Claim number, date, class, type, and amount
 - Customer name
 - Settlement method
 - Marketing object type and name for the line
 - The quantity, price and amount
 - The tax code information
4. Click the icon in the Details Column to display the details for the Line. See the next procedure for information on Line Details.

The Associate Earnings icon is not functional.
5. Click the History item on the side navigation to return to the History Summary Page.

5.2.4.45 Viewing Claim History Line Details

Use this procedure to view the line details history of a claim.

Prerequisites

An existing claim.

Steps

1. Select a claim as show in steps 1-5 of View Claim History Details.
2. Click the Lines item on the side navigation.
3. Click the icon in the Details column.

4. The Claim History Line Detail page displays the following:
5. Click Lines Summary to return to the Claim History Lines page.

5.2.4.46 Viewing Claim History Tasks

Use this procedure to view the tasks history of a claim.

Prerequisites

An existing claim.

Steps

1. Select a claim as show in steps 1-5 of Viewing Claim History Details.
2. Click the Tasks item on the side navigation.
3. To view a list of tasks, select the following parameters and click Apply.
 - View Source or Resources.
 - Date Range.
 - Task Type, leave blank for all.
 - Priority, leave blank for all.
 - Status, leave blank for all.
 - Include Private, select to see private tasks.
4. The Task History page displays the following:
Task number, name, type, status, priority, planned start and end dates, owner type and owner name.
5. Click the link in the Task Number column to view the details of the task.
6. Click the History item on the side navigation to return to the History Summary Page.

5.2.4.47 Viewing Claim Settlement History

Use this procedure to view the settlement history of a claim.

Prerequisites

An existing claim.

Steps

1. Select a claim as show in steps 1-5 of Viewing Claim History Details.
2. Click the Settlement item on the side navigation.
3. The Claim History Settlement page displays the following:
 - Claim number, date, class, type, amount, status
 - Customer Name
 - Effective Date of the settlement
 - Settlement Method
 - GL Date
 - Related Customer. When a Claim is closed, if this field is empty, it is not displayed on the Claim History Settlement page.
 - Relationship Type to the Related Customer.
 - Related Site. This is the Related Custom's Bill To site.
 - Vendor and vendor site (vendor's physical location)
 - Comments
4. Click the History item on the side navigation to return to the History Summary Page.

Oracle Marketing User Interface Reference

This appendix describes the primary tabs, horizontal and side navigation links in the Oracle Marketing user interface. Sections include:

- [Section A.1, "Understanding the Oracle Marketing User Interface"](#)
- [Section A.2, "Search Functionality"](#)
- [Section A.3, "Tabs and Horizontal Navigation Links"](#)

A.1 Understanding the Oracle Marketing User Interface

The Oracle Marketing application user interface is displayed with a row of tabs across the screen directly above a solid band of color, just as file folder tabs would appear in a filing drawer. Each tab controls access to a particular object, such as a campaign, event, deliverable, or message.

Horizontal and Side Navigation

Each tab may have one or more horizontal navigation links. These links group specific areas of functionality related to the parent tab. Horizontal links may also display additional side navigation. Side navigation contains categorized groups of links that enable you to access other related functionality. Some categories are specified as Essential and Optional to help you identify the key components of an object.

Folders

Oracle Marketing uses folders to display the parent-child relationship between marketing objects. Parent objects, such as summary metrics and costs, are indicated by a plus sign displayed just to left of the object name. Only parent objects with child objects are shown with plus signs. Clicking on the plus sign displays a list of child objects in indented fashion directly below the parent object.

Object Display

When you click on a tab, Oracle Marketing automatically displays all the objects (i.e., campaigns, events, schedules, offers, etc.) appropriate for the tab and that are owned by the logged in user.

Much of the application data is displayed in tabular format. To help you organize objects, you can sort tables by clicking on a column heading. Any sortable column heading appears as a hyperlink.

A.2 Search Functionality

Oracle Marketing provides several ways to locate application data:

Quick Find

Use Quick Find to locate a marketing object. Quick Find works even if you know only part of the name of the campaign, event, or other object for which you are looking.

Use the “%” sign as a wild card. For example, to search for a campaign, select Campaigns from the drop down list and enter a partial campaign name. If you enter Q1%, for instance, the application returns a list of all campaigns with names that begin with Q1.

Personalized Search

Personalized Search enables you to create searches according to criteria you select and to save searches for future use. You can specify the number of columns to display, the sort order, and the number of records to display per page.

Use the Personalized Search feature to search for messages, campaigns, deliverables, events, and more. Personalized search cannot be used to locate notes, tasks, or attachments which are associated with marketing objects.

Saved Searches

Saved Searches are searches with predefined search criteria and display options that you can re-use. Use the Personalize button to specify your search criteria and display option and name for the search. Your searches then appear in the Saved Searches LOV.

By selecting a different search, the database is re-queried and the objects appropriate to that new search appear.

A.3 Tabs and Horizontal Navigation Links

This section describes the primary application tabs and horizontal navigation links in Oracle Marketing. Sections include:

- [Section A.3.1, "The Home Page"](#)
- [Section A.3.2, "The Product Tab"](#)
- [Section A.3.3, "The Audience Tab"](#)
- [Section A.3.4, "The Campaign Tab"](#)
- [Section A.3.5, "The Event Tab"](#)
- [Section A.3.6, "The Deliverable Tab"](#)
- [Section A.3.7, "The Budget Tab"](#)
- [Section A.3.8, "The Claim Tab"](#)
- [Section A.3.9, "The Administration Tab"](#)
- [Section A.3.10, "The Execution Tab"](#)
- [Section A.3.11, "The Analytics Tab"](#)
- [Section A.3.12, "The Calendar Tab"](#)

A.3.1 The Home Page

The Home page can be used to display a customized introduction page or to display marketing intelligence data in the form of configurable bins, reports, and charts.

Displaying Marketing Intelligence

Configurable marketing intelligence bins, charts, and reports can be displayed on the Home page. These bins enable users to quickly view the knowledge they need to perform their jobs. The reporting bins contain summary information about key marketing activities, including budget utilization and campaign and event effectiveness. Each bin provides links to drill-down reports with more granular details. The Home page also provides configurable reports and charts containing key marketing information, including top Campaigns by Leads and top Events by Registrations.

The following types of objects are available for display on the Home page:

- Key Metrics bins, which include links to corresponding drill-down reports

- Reporting bins, which include links to corresponding drill-down reports
- Most Recent Bins, which include links to recently accessed campaigns and events
- Reports
- Charts

Each reporting and key metric bin contains links to one or more drill-down reports. The drill-down reports contain detailed information related to the reporting or key metric bin and aggregate selected by the user. The drill-down reports may also contain links to navigate the user to a particular campaign, event or budget object.

During implementation, the system administrator determines which bins, marketing intelligence reports, and charts are available for view and makes them available by responsibility. Users can then use the Personalize link to specify the bins, charts, or reports they want to display on their home page.

Users can also configure each bin, report, or chart for how the data is aggregated and for the number of rows and columns to display via the Edit link in the header of the bin, report, or chart.

A.3.2 The Product Tab

The Product tab provides you with the ability to review, maintain, and create new and existing products. The Product tab displays a listing of Oracle Inventory items that have been created by the user. A product is considered anything you make, purchase or sell. By this definition, a product is not necessarily physical; it can also be a service, or a combination of physical items and services.

Horizontal navigation links include:

- [Products](#)
- [Price Lists](#)
- [Offers](#)
- [Competitor Products](#)

Products

The Products link provides access to viewing, maintaining, and creating detailed product information for the products that you own.

Price Lists

This horizontal navigation link provides you with access to create, view, and maintain price lists.

The following table lists the price list summary fields and their descriptions.

Table A–1 Price Lists Summary Page

Field	Description
Name	A hyperlink that identifies the name of the price list and links to the Price List Details page where you can modify attributes of the selected price list.
Currency	This is the default operating currency for monetary aspects of the product.
Start Date	The date on which the price list becomes active.
End Date	The date on which the price list becomes no longer active.
Status	The current status of the price list (e.g., draft, submitted for approval).
View Price List	Provides a view of the price list.

Offers

Use this link to view of all offers relevant to your specific product. You can also create new product offers from this menu item, which will be automatically associated to your product.

The functionality in both this side navigation and the Offers horizontal navigation link is basically the same. However, one significant difference is that when a you create a new offer with the side navigation option, it is automatically associated to the product, while from the Offers subtab, you must complete a separate set of procedures to have it associated.

Competitor Products

From this link, you can view and maintain competitor product information. For each of your inventory items, you can associate an unlimited list of competitors and their key product attributes such as:

- Competing product name
- Competing product code
- Competing Party Name

- Competitor URL
- Interest type

Depending on user input and requirements, the page can display a complete list of competitors for each of your inventory items and directly access competitor web sites for analysis and review purposes. Consolidated competitor product information enables you to more rapidly assess the best approaches to delivery of offers and promotions for your product.

A.3.3 The Audience Tab

The Audience Tab allows you to import customer or prospect data, view and maintain this data, analyze it using an adhoc query tool (Discoverer) and segment the data for marketing activities.

Horizontal navigation links include:

- [Organization](#)
- [Person](#)
- [List](#)
- [Segment](#)
- [Import](#)
- [Discoverer](#)
- [Search](#)
- [Partner](#)
- [Partner Contacts](#)

Organization

This link provides for a detailed review and entry of information on all types of organizations with which your organization has a relationship. Information on the organization itself, its Relationship to your organization, any Opportunities for sales that may exist, Notes, Tasks and Attachments associated with the organization, the Sales Team associated with the organization, a historical record of Interactions with the organization, and a 360-degree view of the organization from an accounting perspective are all visible from the Organization link.

Person

From the Person link you can maintain information displayed in the summary table, change your summary view, or send collateral. Working from the premise that all business entities are treated equally, this allows Business to Business, Business to Consumer, and mixed business models to be supported equally. People are both customers and business contacts. The definition of a contact is a person who has a relationship (usually an employee/employer relationship) with the organization (or another person) with which you are selling. The definition of an organization is a business entity that has attributes such as an SIC (Standard Industry Code), DUNS (Dunn and Bradstreet number), or tax identification number.

List

This link provides pages to create, manage, edit and generate lists. Lists are groups of customers and prospects from either the organization's customer database or from rented or purchased lists. The entries selected by list generation are viewable from the List link.

Segment

The Segment link provides pages to create, manage, and edit segments. A Segment is a saved set of criteria that can be used to generate a list or define a population of customers or prospects. The major difference between a list and a segment is that a segment will be dynamic while a list is static. The entries generated by a segment may differ over time as customers and prospects who meet the criteria specified by the segment are added and withdrawn from the organization's customer database.

Import

The Import link provides functionality in the form of a wizard to lead a user through the process of importing a rented or purchased list of prospects so that it can be used to generate a list within Oracle Marketing. The wizard guides the user through the process of selecting the data file, mapping its fields to fields in the List Import Table, and populating the List Import Table with the records contained in the data file. Additionally, the user may choose to deduplicate the records with or without the assistance of Word Standardization. If there is an error during list import, users can drill down to the detailed error report, correct the identified errors and directly upload the corrected records back into the system. Once the records have been imported they may be used to generate lists for use with campaigns, events and offers.

Note: While importing a list, some special characters such as '-' or '&' may be a part of the header line. This may result in an error. Remove these characters from the header before you import the list into Oracle Marketing. For more information, see the *SQL*Plus User's and Reference Guide*.

Discoverer

You can launch Oracle Discoverer through Oracle Marketing by clicking the Discoverer link. Oracle Discoverer is interface software that offers users the ability to view and select records from complex databases without knowledge of the database structures or Structured Query Language (SQL).

With Oracle Discoverer, you generate workbooks, which are lists of records similar in design to a spreadsheet. You can then use the workbooks to generate lists or create SQL statements for a segment.

For detailed information on using this product, see the *Oracle Discover Administration Guide*.

Search

The Search link enables you to search for a list entry (person or organization contact) on all lists that are accessible to you. You can search based on First Name, Last Name, Customer Name, Pin#, E-mail, Phone, Address1, City, State or Postal Code. The search results display all the lists that contain list entries that meet the filter criteria specified. You can click on the list name hyperlink to obtain additional information about the list or view the list entries.

Partner

The Partner link provides for review, creation and modification of information associated with the organization's partners. There are three types of Partners:

- General
- Exchange
- Sales

General Partners are any parties in the CRM modules that have a "Partner Of" relationship with another organization or person. General Partners include Sales and Exchange Partners.

- Exchange Partners may participate in the opportunity exchange system between multiple Vendors and a Partner.
- Sales Partners have a specific partner agreement that allows the Vendor to pass a sales deal to that Partner through Oracle Partner Relationship Manager.

Partner Contacts

The Partner Contacts link provides for review, creation, and modification of information regarding contacts at partner organizations as well as internal partner contacts. The Summary Page displays only those parties who have been identified with a Partner or Value Added Distributor relationship.

more

Use the Creating Partner Contacts page to perform the following tasks:

- View partner contact details
- Access the window for creating a partner contact
- Identify those who should receive collateral

A.3.4 The Campaign Tab

From this tab you can organize campaigns and track related tasks, assignments, activities, creative material, and other elements designed to promote or sell concepts, products, and services.

Horizontal navigation links include:

- [Campaigns](#)
- [Programs](#)
- [Offers](#)

Campaigns

Using this link enables you to create and maintain all aspects of your campaign. This includes defining or tracking schedules, offers, triggers, metrics, deliverables, costs, budgets, and security in addition to messages, partners, products, contact points, attachments, tasks and notes. Using these objects, you can define and limit the campaign and eventually record the campaign results.

Programs

This link enables you to create and maintain marketing programs as well as view your program hierarchies. A program is a rollup folder used to group together campaigns and events. A program can roll up into another program; however, campaign, event, or one-off event can only rollup to a program. Any number of programs can be created, to produce a program hierarchy. Cost types and metrics from the subsidiary campaigns and schedules and events and schedules are rolled up in the program hierarchy.

Offers

The Offers link enables you create and maintain offers in relation to other marketing objects such as campaigns, events, and products. In the Campaign context, this link displays the offers related to your campaigns.

Offers are attached to a schedule and are used to define promotional activities like product discounts, accruals and term upgrades. The offer definition process creates the needed qualifiers and modifiers in the Advanced Pricing Engine, which will impact the price of the item bought, the shipping charges, and the order amount during the checkout process. Offers may be created on the Product tab in Oracle Marketing.

A.3.5 The Event Tab

From this tab you can set up and track trade shows, product launches, seminars, and other activities associated with a location or locations.

Horizontal navigation links include:

- [Events](#)
- [Event Schedules](#)
- [One-Off Events](#)
- [Programs](#)
- [Registrations](#)
- [Venue](#)

Events

An event can be a seminar, a class, a product demonstration, or any other activity that is location specific. You can create an event as a stand-alone activity or as part of a campaign.

Event Schedules

Using Event Schedules functionality, you can:

- Create event agendas with multiple tracks and multiple sessions
- Create track and session details
- Print and download agendas
- Enter external resources for an event agenda and notify them using e-mail and update status based on response
- Manage resource availability by the hour rather than by the day

One-Off Events

An “event” type object in Oracle Marketing, used to define an event taking place once, in one location only. This allows the user to create an event schedule, without first having to create an event (or a Campaign) plus a schedule.

Programs

Programs are an umbrella object used to combine different Campaigns, Events, Deals, Promotions and other objects into one entity. In this way, a new product launch may have events, campaigns, promotions, advertising, trade management deals and more coordinated from one point in Oracle Marketing.

Registrations

Use this functionality register attendees for an event and to support employees in registering themselves for an event. Managers can register themselves, as well as their direct reports, as desired. If an employee does not have access to Oracle Marketing, this link is also accessible within other applications, for enrollment in events.

Venue

The system stores only venue-specific (capacity, size, and so on) information in specific tables. For example, you can create a hotel chain as an organization, and potentially split into several sub-organizations. You could then have each actual hotel represented as an address. Then, when you create a venue, you will associate it with the address of an existing organization.

For information on adding venue contacts to the system, see the *Oracle Sales Online User Guide*.

A.3.6 The Deliverable Tab

From this tab you can track and manage creative materials associated with campaigns, events and organizations as well as the organization's messages.

Horizontal navigation links include:

- [Deliverable](#)
- [Messages](#)

Deliverable

Using the Deliverable link, you can:

- Define and maintain deliverables attributes
- Define Deliverable Kits
- Create and review attachments
- Define costs and revenues
- Define metrics
- Define e-mail content

Messages

The Messages link manages marketing messages. These marketing messages are associated with campaigns and events.

A.3.7 The Budget Tab

From this tab you can track, manage and control funding for campaigns, events, offers and deliverables. This tab also features a budget checkbook for reviewing expenditures.

A.3.8 The Claim Tab

From this tab you can track, research and settle claims and deductions to ensure proper processing of valid and invalid claims.

A.3.9 The Administration Tab

The Administration tab is used to set site level options for the application. The Marketing horizontal navigation link displays options specific to Oracle Marketing.

Other horizontal navigation links, such as Leads, may appear based on your integration scenario.

A.3.10 The Execution Tab

Using this tab you can create and execute marketing campaigns targeted at customer segments on their storefronts. You can also create product recommendations and display them in iStore.

A.3.11 The Analytics Tab

Use this tab to create predictive models of customer and/or prospect behavior based on historical data, and use these models to predict which segments to target in future campaigns. In this tab you can create and manage models and scoring runs. You can also:

- Create a list of customers and/or prospects that are most likely to respond to your e-mail, telemarketing, or direct mail campaign.
- Create a list of 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.

A.3.12 The Calendar Tab

Provides access to the marketing calendar.

Home Page Bin, Report, and Chart Reference

This appendix describes the bins, reports, and charts available to the Oracle Marketing home page. Sections include:

- [Section B.1, "Home Page Bins"](#)
- [Section B.2, "Home Page Reports"](#)
- [Section B.3, "Home Page Charts"](#)

B.1 Home Page Bins

This section presents a detailed listing of the components of the bins available in Oracle Marketing. Bins are displayed on the Oracle Marketing home page. Prior to displaying bin data, you must implement market intelligence, as described in the *Oracle Marketing Implementation Guide*.

The following table summarizes the available bins:

Table B–1 Home Page Bins

Name	Description	Related Section
Campaign Effectiveness	Summarizes the total number of leads and lead amount created against campaigns during the period	Section B.1.1, "Campaign Effectiveness Bin"
Completed Web Surveys	Summarizes the total number of leads added, invalid and went into lead import from the web response point of view during the period. Also calculates the change since the last period.	Section B.1.2, "Completed Web Surveys Bin"
Event Effectiveness	Summarizes the total number of registrations, leads and lead amount created against events during the period	Section B.1.3, "Event Effectiveness Bin"
Lead Import Statistics	Summarizes the total number of leads added, valid, invalid and new from import point of view during the period. It also calculates the change since the last period.	Section B.1.4, "Lead Import Statistics Bin"
Lead to Opportunity (Key Metrics)	Summarizes the Key Performance Indicators like Lead Coverage and Lead to Opportunity from Lead Intelligence and other modules.	Section B.1.5, "Lead to Opportunity Bin (Key Metrics)"
Lead Quality	Summarizes total number of leads by quality (rank) during the period. Also calculates the change since the last period.	Section B.1.6, "Lead Quality Bin"
Lead Sources	Summarizes total number of leads by source of origin during the period. Also calculates the change since the last period.	Section B.1.7, "Lead Sources Bin"
Marketing Activities	Summarizes the number of active marketing activities for a given period	Section B.1.8, "Marketing Activities Bin"
Marketing Budgets	Summarizes the amount of budget committed, utilized and balance for a given period	Section B.1.9, "Marketing Budgets Bin"

Table B–1 Home Page Bins

Name	Description	Related Section
Response to Lead (Key Metrics)	Summarizes the Key Performance Indicators from Oracle Marketing and other modules	Section B.1.10, "Response to Lead Bin (Key Metrics)"
Responses	Summarizes the total number of responses added and converted during the period. Also calculates the change since the last period.	Section B.1.10, "Response to Lead Bin (Key Metrics)"
Web Responses	Summarizes the total number of web responses.	Section B.1.11, "Web Responses Bin"

B.1.1 Campaign Effectiveness Bin

This bin summarizes the total number of Leads and Lead Amounts created against Campaigns during the period. This bin comprises all leads except dead leads.

Table B–2 Campaign Effectiveness Bin Columns

Column Name	Description
Period	Period is displayed based on the option chosen in parameter 'Aggregate by'. The period displayed is hyper linked to the following drill down reports: ■ Campaigns by Leads and Opportunities ■ Campaigns by Activity ■ Campaigns by Budget Amount ■ Campaign to Order The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.
Lead	Total number of leads created against the campaigns during the period, excluding dead leads.
Lead Amount	The sum of Lead amount of all leads created against the campaign during the period.

Table B–3 Campaign Effectiveness Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Aggregate By	Data can be aggregated by period. The default period is Quarter. ■ Month - Aggregates by Month defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.1.2 Completed Web Surveys Bin

This bin summarizes the web responses information for the period.

Table B–4 Completed Web Surveys Columns

Column Name	Description
Added	The total number of completed web surveys for the time period.
Invalid	The number of completed web surveys that are invalid.
To Lead Import	The number of completed web surveys that were passed to the lead import engine.

The period displayed is hyperlinked to the following drill down reports:

- Completed Web Surveys by Region

- Completed Web Surveys by Campaign
- Invalid Web Surveys by Reason

Table B-5 Completed Web Surveys Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Aggregate By	Data can be aggregated by period. The default period is Quarter. ■ Month - Aggregates by Month defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Incremental (Day, Week, Month, Quarter, Year) Aggregated as follows: ■ Day is 24 hours prior to Last Refresh Date/Time. ■ Wk is 7 days prior to Last Refresh Date/Time (Rolling 7 Days). ■ Mth is from start of current month to Last Refresh Date/Time. ■ Qtr is from start of current fiscal quarter to Last Refresh Date/Time. ■ Yr is current fiscal quarter plus previous 3 fiscal quarters (Rolling 4 Quarters). Examples: ■ Day 9-Nov-01 to 10-Nov-01 ■ Wk 4-Nov-01 to 10-Nov-01 ■ Mth 1-Nov-01 to 10-Nov-01 ■ Qtr 1-Sep-01 to 10-Nov-01 ■ Yr 1-Dec-00 to 10-Nov-01 0

B.1.3 Event Effectiveness Bin

This bin summarizes the total number of Registrations, Leads and Lead Amounts created against Events during the period. This bin summarizes all leads except dead leads.

Table B–6 Event Effectiveness Columns

Column Name	Description
Period	Period is displayed based on the option chosen in parameter 'Aggregate by'. The period displayed is hyperlinked to the following drill down reports: ■ Events by Leads and Opportunities ■ Events by Event type ■ Events by Budget Amount ■ Events by Registrants The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.
Registration	Total number of registrations created against the events during the period.
Lead	Total number of leads created against the events during the period, excluding dead leads.
Lead Amount	The sum of Lead amount of all leads created against the events during the period.

Table B–7 Event Effectiveness Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.

Table B–7 Event Effectiveness Parameters

Parameter Name	Description
Aggregate By	Data can be aggregated by period. The default period is Quarter. ■ Month - Aggregates by Month defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.1.4 Lead Import Statistics Bin

This bin summarizes the lead import statistics during the period.

Table B–8 Lead Import Statistics Columns

Column Name	Description
Added	The total number of valid, invalid and new leads.
Valid	The number of successfully imported leads.
Invalid	The number of lead import failures.
New	The total number of leads added to the import interface engine during the period.

The period displayed is hyperlinked to the following drill down reports:

- Lead Import Statistics by Region
- Lead Import Statistics by Campaign
- Invalid Leads by Reason

Table B–9 Lead Import Statistics Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Aggregate By	Data can be aggregated by period. The default period is Quarter. ■ Month - Aggregates by Month defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Incremental (Day, Week, Month, Quarter, Year) Aggregated as follows: ■ Day is 24 hours prior to Last Refresh Date/Time. ■ Wk is 7 days prior to Last Refresh Date/Time (Rolling 7 Days). ■ Mth is from start of current month to Last Refresh Date/Time. ■ Qtr is from start of current fiscal quarter to Last Refresh Date/Time. ■ Yr is current fiscal quarter plus previous 3 fiscal quarters (Rolling 4 Quarters). Examples: ■ Day 9-Nov-01 to 10-Nov-01 ■ Wk 4-Nov-01 to 10-Nov-01 ■ Mth 1-Nov-01 to 10-Nov-01 ■ Qtr 1-Sep-01 to 10-Nov-01 ■ Yr 1-Dec-00 to 10-Nov-01 0

Table B–9 Lead Import Statistics Parameters

Parameter Name	Description
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.1.5 Lead to Opportunity Bin (Key Metrics)

This bin summarizes the Key Performance Indicators from Lead Intelligence and other modules.

Table B–10 Lead to Opportunity Columns

Column Name	Description
Key Metrics	Key Metrics: ■ Leads Assigned ■ Lead to Opportunity Each key metric is a hyperlink to drilldown detail reports specific to each key metric. Lead Assignment drill down to the following reports: ■ Conversion Rates by Sales Group ■ Campaign Conversion Rates The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.

Table B-10 Lead to Opportunity Columns

Column Name	Description
Value	- Lead Coverage For this key metric, the value is calculated as the total amount of open leads in the system with how many are currently being worked on. This is a percentage. OPEN = status of OPEN only Formula: (assigned/lead open)*100 - Lead to Opportunity For this key metric, the value is calculated by dividing the number of leads that have been converted to opportunities by the total amount of leads in the system. This is a percentage. Total # of Leads = all lead statuses minus dead leads Formula: Converted/Total # of leads * 100
Change	- This column is the percentage representation of the difference between the current Lead Assignment value and the Lead Assignment value from the previous time aggregate. - This column is the percentage representation of the difference between the current Lead to Opportunity value and the Lead to Opportunity value from the previous time aggregate.
Status	The Status column is common across all Key Metrics. The indicator arrow images mean the following: Green Up indicates data increasing over the comparison period and that for this attribute, an increase is good. Green Down indicates data decreasing over the comparison period and that for this attribute, the decrease is good. Red Up indicates data increasing over the comparison period and for this attribute, an increase is bad. Red down indicates data decreasing over the comparison period and that for this attribute, a decrease is bad.

Status Indicators					
Column	From Prev Period	Green Up	Green Down	Red Up	Red Down
Leads Assigned	Increase	X			

Status Indicators					
Column	From Prev Period	Green Up	Green Down	Red Up	Red Down
Leads Assigned	Decrease				X
Lead to Opportunity	Increase	X			
Lead to Opportunity	Decrease				X

Table B-11 Lead to Opportunity Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Fixed Calculation Period	Data can be aggregated by period. Default is Quarter. ■ Daily - Last 24 hours (Last refresh date) ■ Weekly - Start of week to current date, up to 7 days. Week begins on a Sunday. ■ Monthly - Start of month, up to 30 days. ■ Quarterly - Start of current quarter, up to current date. ■ Yearly - Start of current fiscal year, up to current date. Examples: ■ Daily 9-Nov-01 to 10-Nov-01 ■ Weekly 4-Nov-01 to 10-Nov-01 ■ Monthly 1-Nov-01 to 10-Nov-01 ■ Quarterly 1-Sep-01 to 10-Nov-01 ■ Yearly 1-Jun-01 to 10-Nov-01

B.1.6 Lead Quality Bin

This bin summarizes the total number of leads created per rank during the period.

Table B–12 Lead Quality Bin Columns

Column Name	Description
First Defined Rank	The A, B, and C columns of this bin are defined at: Administration, Marketing > Setup > Code Definition, Object Type Rank.
Second Defined Rank	N/A
Third Defined Rank	N/A
Others	These are leads belonging to ranks not shown in the first three columns.
Total	Total leads by all ranks during the period.

The period displayed is hyperlinked to the following drill down reports:

- Lead Quality by Region
- Lead Quality by Campaign
- Lead Quality by Status

Table B–13 Lead Quality Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'

Table B-13 Lead Quality Parameters

Parameter Name	Description
Aggregate By	Data can be aggregated by period. Default is Quarter. ■ Month - Aggregates by Month defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Incremental (Day, Week, Month, Quarter, Year) Aggregated as follows: ■ Day is 24 hours prior to Last Refresh Date/Time. ■ Wk is 7 days prior to Last Refresh Date/Time (Rolling 7 Days). ■ Mth is from start of current month to Last Refresh Date/Time. ■ Qtr is from start of current fiscal quarter to Last Refresh Date/Time. ■ Yr is current fiscal quarter plus previous 3 fiscal quarters (Rolling 4 Quarters). Examples: ■ Day 9-Nov-01 to 10-Nov-01 ■ Wk 4-Nov-01 to 10-Nov-01 ■ Mth 1-Nov-01 to 10-Nov-01 ■ Qtr 1-Sep-01 to 10-Nov-01 ■ Yr 1-Dec-00 to 10-Nov-01 0
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.1.7 Lead Sources Bin

This bin summarizes the total number of leads created per source during the period.

Table B–14 Lead Sources Columns

Column Name	Description
First Defined Source	The A, B, and C columns of this bin are defined at: Administration > Marketing > Setup > Code Definition, Object Type Source.
Second Defined Source	N/A
Third Defined Source	N/A
Others	Leads belonging sources not shown in the first three columns.
Total	Total leads by all sources during the period.

The period displayed is hyperlinked to the following drill down reports:

- Lead Source by Region
- Lead Source by Campaign
- Lead Source by Status

Table B–15 Lead Sources Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'

Table B–15 Lead Sources Parameters

Parameter Name	Description
Aggregate By	Data can be aggregated by period. Default is Quarter. - Month - Aggregates by Month defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. - Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. - Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. - Incremental (Day, Week, Month, Quarter, Year) Aggregated as follows: - Day is 24 hours prior to Last Refresh Date/Time. - Wk is 7 days prior to Last Refresh Date/Time (Rolling 7 Days). - Mth is from start of current month to Last Refresh Date/Time. - Qtr is from start of current fiscal quarter to Last Refresh Date/Time. - Yr is current fiscal quarter plus previous 3 fiscal quarters (Rolling 4 Quarters). Examples: - Day 9-Nov-01 to 10-Nov-01 - Wk 4-Nov-01 to 10-Nov-01 - Mth 1-Nov-01 to 10-Nov-01 - Qtr 1-Sep-01 to 10-Nov-01 - Yr 1-Dec-00 to 10-Nov-01 0

B.1.8 Marketing Activities Bin

This bin summarizes the number of active marketing activities for a given period.

Table B–16 Marketing Activities Columns

Column Name	Description
Period	Period is displayed based on the option chosen in parameter 'Aggregate by'.
Count	The number of active marketing activities at the start of the period.
Started	The number of marketing activities activated during the period.

Table B–16 Marketing Activities Columns

Column Name	Description
Ended	The number of marketing activities that ended during the period.
Change	The change from previous value to current value. Formula: ((Current - Previous) / Previous) * 100

Table B–17 Marketing Activities Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'

Table B-17 Marketing Activities Parameters

Parameter Name	Description
Aggregate By	Data can be aggregated by period. The default period is Quarter. ■ Month - Aggregates by Month defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Incremental (Day, Week, Month, Quarter, Year) Aggregated as follows: ■ Day is 24 hours prior to Last Refresh Date/Time. ■ Wk is 7 days prior to Last Refresh Date/Time (Rolling 7 Days). ■ Mth is from start of current month to Last Refresh Date/Time. ■ Qtr is from start of current fiscal quarter to Last Refresh Date/Time. ■ Yr is current fiscal quarter plus previous 3 fiscal quarters (Rolling 4 Quarters). Examples: ■ Day 9-Nov-01 to 10-Nov-01 ■ Wk 4-Nov-01 to 10-Nov-01 ■ Mth 1-Nov-01 to 10-Nov-01 ■ Qtr 1-Sep-01 to 10-Nov-01 ■ Yr 1-Dec-00 to 10-Nov-01 0

B.1.9 Marketing Budgets Bin

This bin summarizes the amount of Budget committed, utilized and balance for a given period. Note that only those budgets, which are active during the given time period, are considered for calculating these figures. For example, a budget is active for a period of 3 months starting from '01-Mar-2001' to '31-May-2001'. This budget is considered for calculating the total committed, utilized and balance amounts only for months of March, April and May 2001.

Table B–18 Marketing Budgets Columns

Column Name	Description
Period	Period is displayed based on the option chosen in parameter 'Aggregate by'. The period displayed is hyperlinked to the following drill down reports: ■ Budgets by Utilization ■ Budgets by Activity ■ Budgets by Campaign ■ Budgets by Business Unit The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.
Committed	The sum of all the budget commitments or approvals made during the period.
Utilized	The sum of all the budgets utilization occurred during the period. Budget utilization is recorded only the Actual costs are posted to Budgets.
Balance	The sum of the balance of all the budgets which are active during the period.

Table B–19 Marketing Budgets Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'

Table B-19 Marketing Budgets Parameters

Parameter Name	Description
Aggregate By	Data can be aggregated by period. The default period is Quarter. ■ Month - Aggregates by Month defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Incremental (Day, Week, Month, Quarter, Year) Aggregated as follows: ■ Day is 24 hours prior to Last Refresh Date/Time. ■ Wk is 7 days prior to Last Refresh Date/Time (Rolling 7 Days). ■ Mth is from start of current month to Last Refresh Date/Time. ■ Qtr is from start of current fiscal quarter to Last Refresh Date/Time. ■ Yr is current fiscal quarter plus previous 3 fiscal quarters (Rolling 4 Quarters). Examples: ■ Day 9-Nov-01 to 10-Nov-01 ■ Wk 4-Nov-01 to 10-Nov-01 ■ Mth 1-Nov-01 to 10-Nov-01 ■ Qtr 1-Sep-01 to 10-Nov-01 ■ Yr 1-Dec-00 to 10-Nov-01
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

Note: When budget facts are loaded, the program will consider pre-approval transactions. When pre approval transactions are considered, there may be time periods for which there is no data. The summarized data may not have information in the comparative period and thus may not be able to display a positive or negative value in the form of an arrow.

B.1.10 Response to Lead Bin (Key Metrics)

This bin summarizes the Key Performance Indicators from Oracle Marketing and other modules.

Table B–20 Response to Lead Columns

Column Name	Description
Key Metrics	Key Metrics: ■ Leads ■ ‘A’ Lead Ratio ■ Cost per Lead ■ Revenue per Lead Each key metric is a hyperlink to drilldown detail reports specific to each key metric. Currently Leads and ‘A’ Lead Ratio do not drill down to any reports. However, Cost per Lead and Revenue per Lead drill to the following reports: ■ Campaign Cost and Revenue ■ Event Cost and Revenue The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.

Table B-20 Response to Lead Columns

Column Name	Description
Value	■ Leads Shows the total amount of all leads, except dead leads, during the period. ■ 'A' Lead Ratio Shows the percentage of 'A' (top) quality leads of all leads during the period. (This is all leads except dead leads.) The Value is calculated by dividing the number of all 'A' quality leads during the period by the total number of leads. ■ Cost per Lead Shows the budgetary cost of generating all leads during the period. The Value is calculated by dividing the budget of all current Campaign and Events during the period by the total number of leads. Equally allocated per “active” day. ■ Revenue per Lead shows the booked revenue ratio as a result of all leads that were generated during the period. The Value is calculated by dividing the booked revenue associated with all leads during the period by the total number of leads.
Change	■ Leads: The Change is calculated by comparing the total number of leads for the current period with the total number of leads for the previous refresh period. E.g. if on October 1 there were 1,000 leads and on November 1 there were 1,200, to get the % Change, take $((1,200 - 1,000) / 1,000) * 100$. The negative(-) or positive (+) signs indicate if the change is up or down from the previous period. ■ 'A' Lead Ratio: The Change is calculated by comparing the 'A' quality lead ratio for the current period with the 'A' quality lead ratio for the previous refresh period. ■ Cost per Lead: The Change is calculated by comparing the cost per lead ratio for the current period with the cost per lead ratio for the previous refresh period. ■ Revenue per Lead: The Change is calculated by comparing the revenue per lead for the current period with the revenue per lead for the previous refresh period.

Table B–20 Response to Lead Columns

Column Name	Description
Status	The Status column is common across all Key Metrics. The indicator arrow images mean the following: - Green Up - Indicates data increasing over the comparison period and that for this attribute, an increase is good. - Green Down - Indicates data decreasing over the comparison period and that for this attribute, a decrease is good. - Red Up - Indicates data increasing over the comparison period and that for this attribute, an increase is bad. - Red Down - Indicates data decreasing over the comparison period and that for this attribute, a decrease is bad.

Status by Column					
Column	From Prev Period	Green Up	Green Down	Red Up	Red Down
Leads	Increase	X			
Leads	Decrease				X
A Leads	Increase	X			
A Leads	Decrease				X
Cost/Lead	Increase			X	
Cost/Lead	Decrease		X		
Revenue/Lead	Increase	X			
Revenue/Lead	Decrease				X

Table B–21 Response to Lead Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.

Table B–21 Response to Lead Parameters

Parameter Name	Description
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Fixed Calculation Period	Data can be aggregated by period. The default period is Quarter. ■ Daily - Last 24 hours (Last refresh date) ■ Weekly - Start of week to current date, up to 7 days. Week begins on a Sunday. ■ Monthly - Start of month, up to 30 days. ■ Quarterly - Start of current quarter, up to current date. ■ Yearly - Start of current fiscal year, up to current date. Examples: ■ Daily 9-Nov-01 to 10-Nov-01 ■ Weekly 4-Nov-01 to 10-Nov-01 ■ Monthly 1-Nov-01 to 10-Nov-01 ■ Quarterly 1-Sep-01 to 10-Nov-01 ■ Yearly 1-Jun-01 to 10-Nov-01

B.1.11 Web Responses Bin

This bin summarizes the responses information for the period.

Table B–22 Web Responses Columns

Column Name	Description
Added	The number of responses adding during the period.
Converted	The number of responses converted to leads during the period.
Total	The total number of responses at the beginning of the period plus the number of responses added during the period.

The period displayed is hyperlinked to the following drill down reports:

- Completed Web Surveys by Region
- Completed Web Surveys by Campaign
- Invalid Web Surveys by Region

Table B–23 Web Responses Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Aggregate By	Data can be aggregated by period. The default period is Quarter. ■ Month - Aggregates by Month defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'. ■ Incremental (Day, Week, Month, Quarter, Year) Aggregated as follows: ■ Day is 24 hours prior to Last Refresh Date/Time. ■ Wk is 7 days prior to Last Refresh Date/Time (Rolling 7 Days). ■ Mth is from start of current month to Last Refresh Date/Time. ■ Qtr is from start of current fiscal quarter to Last Refresh Date/Time. ■ Yr is current fiscal quarter plus previous 3 fiscal quarters (Rolling 4 Quarters). Examples: ■ Day 9-Nov-01 to 10-Nov-01 ■ Wk 4-Nov-01 to 10-Nov-01 ■ Mth 1-Nov-01 to 10-Nov-01 ■ Qtr 1-Sep-01 to 10-Nov-01 ■ Yr 1-Dec-00 to 10-Nov-01 0

B.2 Home Page Reports

This section presents a detailed listing of the reports available in Oracle Marketing. Reports are displayed on the Oracle Marketing home page. Prior to displaying Report data, marketing intelligence must be implemented, as described in the *Oracle Marketing Implementation Guide*.

The following table lists the reports that can be displayed on the Oracle Marketing home page:

Table B–24 Home Page Reports

Report Name	Description	Related Section
Budget Utilization (Budget by Total Amount)	Summarizes budget utilization information	Section B.2.1, "Budget Utilization Report (Budget by Total Amount)"
Budgets by Activity	Summarizes budget information per activity.	Section B.2.2, "Budgets by Activity Report"
Budgets by Business Unit	Summarizes budget information per business unit	Section B.2.3, "Budgets by Business Unit Report"
Budgets by Campaign	Summarizes budget information per campaign	Section B.2.4, "Budgets by Campaign Report"
Campaign Conversion Rates	Summarizes lead conversion rate information by campaign.	Section B.2.5, "Campaign Conversion Rate Report"
Campaign Cost and Revenue	Summarizes costs and revenues per campaign	Section B.2.6, "Campaign Cost and Revenue Report"
Campaign Cost, Revenue and ROI	Summarizes costs, revenues and return on investments per campaign	Section B.2.7, "Campaign Cost, Revenue and ROI Report"
Campaign to Order	Summarizes order information per campaign	Section B.2.8, "Campaign to Order Report"
Campaigns by Activity	Summarizes campaign information per activity	Section B.2.9, "Campaigns by Activity Report"
Campaign Budget Amount by Activity Type	Summarizes budget information per Activity Type	Section B.2.10, "Campaign Budget Amount by Activity Type Report"
Campaigns by Leads and Opportunities	Summarizes lead and opportunity information per campaign	Section B.2.11, "Campaigns by Leads and Opportunities Report"

Table B–24 Home Page Reports

Completed Web Surveys by Campaigns	Summarizes completed web survey information per campaign.	Section B.2.12, "Completed Web Surveys by Campaign Report"
Completed Web Surveys by Region	Summarizes completed web survey information per region.	Section B.2.13, "Completed Web Surveys by Region Reports"
Conversion Rates by Sales Group	Summarizes lead conversion rate information by sales group.	Section B.2.14, "Conversion Rates by Sales Group Report"
Event Cost and Revenue	Summarizes costs and revenues per event	Section B.2.15, "Event Cost and Revenue Report"
Event Cost, Revenue and ROI	Summarizes costs, revenues and return on investments per event.	Section B.2.16, "Event Cost, Revenue and ROI Report"
Events by Budget Amount	Summarizes budget information per event	Section B.2.17, "Events by Budget Amount Report"
Events by Event Type	Summarizes budget and event information per event type	Section B.2.18, "Events by Event Type Report"
Events by Leads and Opportunities	Summarizes leads and opportunities information per event	Section B.2.19, "Leads by Opportunity Report"
Events by Registrants	Summarizes registration information per event	Section B.2.20, "Events by Registrants Report"
Invalid Leads by Reason	Summarizes invalid leads by reason.	Section B.2.21, "Invalid Leads by Reason Report"
Invalid Web Surveys by Reason	Summarizes invalid web survey information by reason.	Section B.2.22, "Invalid Web Surveys by Reason Report"
Lead Aging by Quality	Summarizes leads information based on lead age by sales rank.	Section B.2.23, "Lead Aging by Quality Reports"
Lead Aging by Sales Group	Summarizes leads information based on lead age by sales group.	Section B.2.24, "Lead Aging by Sales Group Report"
Lead Assignment and Conversion by Sales Group	Summarizes lead assignment and conversion information by sales group.	Section B.2.25, "Lead Assignment and Conversion by Sales Group Reports"

Table B–24 Home Page Reports

Lead Import Statistics by Campaign	Summarizes lead import statistics per campaign.	Section B.2.26, "Lead Import Statistics by Campaign Report"
Lead Import Statistics by Region	Summarizes lead import statistics per region.	Section B.2.27, "Lead Import Statistics by Region Report"
Lead Quality by Campaign	Summarizes leads by rank per campaign.	Section B.2.28, "Lead Quality by Campaign Report"
Lead Quality by Region	Summarizes leads by rank per region.	Section B.2.29, "Lead Quality by Region Report"
Lead Quality by Status	Summarizes leads by rank per status.	Section B.2.30, "Lead Quality by Status Report"
Lead Sources by Campaign	Summarizes leads by source per campaign.	Section B.2.31, "Lead Sources by Campaign Report"
Lead Sources by Region	Summarizes leads by source per region.	Section B.2.32, "Lead Sources by Region Report"
Lead Sources by Status	Summarizes leads by source per status.	Section B.2.33, "Lead Sources by Status Report"
Lead Status by Campaign	Summarizes leads by status per campaign.	Section B.2.34, "Lead Status by Campaign Report"
Responses by Activity	Summarizes Interaction History responses information by activity.	Section B.2.35, "Responses by Activity Report"
Responses by Campaign	Summarizes Interaction History responses information by campaign.	Section B.2.36, "Responses by Campaign Report"

B.2.1 Budget Utilization Report (Budget by Total Amount)

This report summarizes Budget utilization information.

Table B–25 Budget Utilization Columns

Column Name	Description
Budget Name	Budget name
Total	This represent total budget minus holdback.

Table B–25 Budget Utilization Columns

Column Name	Description
Planned	Sum of planned amount. Planned amount is any amount for which new campaigns or offers are in Waiting or Approval stage.
Committed	Sum of committed amount. Committed amount is any amount for campaigns with an Approval status.
Utilized	Sum of the amount of total budget earned or used.
Balance	Sum of the amount of funds available for further activity. Balance = Budget – Committed
Paid	Sum of paid amount. Paid amount is the total paid on the promotion, amounts deducted on the face of the invoice, rendered checks and submitted credit memos.
Category	A category in which the budget falls.

Table B–26 Budget Utilization Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.2 Budgets by Activity Report

This report summarizes Budget information per Activity.

Table B–27 Budget by Activity Columns

Column Name	Description
Activity	Activity name.
Number of Budgets	The number of budgets currently opened for this Activity.
Approved Budget Amount	The total budget amount allocated to the Activity by approved budget lines
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Activity.

Table B–28 Budget by Activity Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.3 Budgets by Business Unit Report

This report summarizes Budget information per Business Unit.

Table B–29 Budget by Business Unit Columns

Column Name	Description
Business Unit	Business Unit name.
Number of Budgets	The number of budgets currently opened for this business unit.
Total	This represent total budget.
Planned	Sum of planned amount. Planned amount is any amount for which new campaigns or offers are in Waiting or Approval stage.
Committed	Sum of committed amount. Committed amount is any amount for campaigns with an Approval status.
Utilized	Sum of the amount of total budget earned or used.
Paid	Sum of paid amount. Paid amount is the total paid on the promotion, amounts deducted on the face of the invoice, rendered checks and submitted credit memos.

Table B–30 Budget by Business Unit Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.4 Budgets by Campaign Report

This report summarizes Budget information per Campaign.

Table B–31 Budgets by Campaign Column

Column Name	Description
Campaign Name	Campaign name.
Number of Budgets	The number of budgets currently opened for this Campaign.
Approved Budget Amount	The total budget amount allocated to the Activity by approved budget lines.
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Activity.

Table B–32 Budgets by Report Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.5 Campaign Conversion Rate Report

This report summarizes the rate of lead conversion to opportunities, quotes and orders by sales group.

Table B–33 Campaign Conversion Rate Columns

Column Name	Description
Campaign	Campaign Name.
Total Leads	Sum of total leads during the period.
Open Leads	Sum of open leads during the period.
% Converted Leads	The number of opportunities divided by total leads multiplied by 100.
Total Opportunities	Sum of total opportunities during the period.
Open Opportunities	Sum of open opportunities during the period.
Converted to Quotes	The number of quotes divided by total opportunities multiplied by 100.
Total Quotes	Sum of total quotes during the period.
Open Quotes	Sum of open quotes during the period.
Converted to Orders %	The number of orders divided by total quotes multiplied by 100.

Table B–34 Campaign by Conversion Rate Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.

Table B–34 Campaign by Conversion Rate Parameters

Parameter Name	Description
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions
Fixed Calculation Period	■ Data can be aggregated by period. Default is Quarter. ■ Daily - Last 24 hours (Last refresh date) ■ Weekly - Start of week to current date, up to 7 days. Week begins on a Sunday. ■ Monthly - Start of month, up to 30 days. ■ Quarterly - Start of current quarter, up to current date. ■ Yearly - Start of current fiscal year, up to current date. Examples: ■ Daily 9-Nov-01 to 10-Nov-01 ■ Weekly 4-Nov-01 to 10-Nov-01 ■ Monthly 1-Nov-01 to 10-Nov-01 ■ Quarterly 1-Sep-01 to 10-Nov-01 ■ Yearly 1-Jun-01 to 10-Nov-01

B.2.6 Campaign Cost and Revenue Report

This report summarizes Costs and Revenues per Campaign.

Table B–35 Campaign Cost and Revenue Columns

Column Name	Description
Campaign	Campaign Name.
Total Cost	Period-to-date cost which is the cumulative amount of the approved budget for the period.
Total Revenue	Period-to-date revenue which is the cumulative amount of revenue for the period. This is booked order in the CRM schema for actual revenue.
Response Count	The sum of positive responses for the period.

Table B–35 Campaign Cost and Revenue Columns

Column Name	Description
Cost Per Response	Total approved budget amount for the campaigns for the activity divided by the number of cumulative responses.
Revenue Per Response	The sum of the revenue for that period divided by the number of responses for that period.
Response Lead Count	Total number of leads created against the campaigns during the period. This excludes dead leads.
Cost per Lead	The sum of Period-to-date cost divided by the sum of lead count.
Revenue per Lead	The sum of the revenue for that period divided by the sum of leads for that period.
Order Count	The number of booked orders.
Cost per Order	The total booked order amount divided by the number of orders booked.
Revenue per Order	The sum of the revenue for that period divided by the sum of orders for that period.

Table B–36 Campaign Cost and Revenue Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

Table B–36 Campaign Cost and Revenue Parameters

Parameter Name	Description
Fixed Calculation Period	- Data can be aggregated by period. Default is Quarter. - Daily - Last 24 hours (Last refresh date) - Weekly - Start of week to current date, up to 7 days. Week begins on a Sunday. - Monthly - Start of month, up to 30 days. - Quarterly - Start of current quarter, up to current date. - Yearly - Start of current fiscal year, up to current date. Examples: - Daily 9-Nov-01 to 10-Nov-01 - Weekly 4-Nov-01 to 10-Nov-01 - Monthly 1-Nov-01 to 10-Nov-01 - Quarterly 1-Sep-01 to 10-Nov-01 - Yearly 1-Jun-01 to 10-Nov-01

B.2.7 Campaign Cost, Revenue and ROI Report

This report summarizes Costs, Revenues and Return on Investments per Campaign.

Table B–37 Campaign Cost, Revenue, ROI Columns

Column Name	Description
Campaign	Campaign name.
Actual Cost	Period to-date cost - The cumulative amount of the approved budget for the period.
Forecasted Cost	From Metrics value. Summarize schedule cost and the parent cost.
Cost Variance	$((\text{actual} - \text{forecast}) / \text{forecast}) * 100$
Actual Revenue	Booked order amount in Quoting/Order Capture.
Forecasted Revenue	From Metrics value. Summarize schedule revenue and the parent revenue.
Revenue Variance	$((\text{actual} - \text{forecast}) / \text{forecast}) * 100$
Actual ROI	$((\text{actual revenue} - \text{actual cost}) / \text{actual cost}) * 100$
Forecasted ROI	$((\text{forecast revenue} - \text{forecast cost}) / \text{forecast cost}) * 100$

Table B–37 Campaign Cost, Revenue, ROI Columns

Column Name	Description
ROI Variance	$((\text{actual} - \text{forecast}) / \text{forecast}) * 100$

Table B–38 Campaign Cost, Revenue, ROI Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions
Period	Data can be aggregated by period. Default is Current Quarter. ■ A list of all fiscal Years ■ A list of all quarters

B.2.8 Campaign to Order Report

This report summarizes Order information per Campaign.

Table B–39 Campaign to Order Columns

Column Name	Description
Campaign Name	Campaign name.
Total Responses	Sum of responses, collected in Interaction History, based on the aggregate.
Converted to Leads	Sum of responses converted to a lead based on aggregate. $((\text{open} + \text{closed leads}) / \text{total responses}) * 100$

Table B–39 Campaign to Order Columns

Column Name	Description
Open Leads	Total number of leads created against the campaigns which are open during the period.
Close Leads	Sum of Leads closed based on aggregate. All closed leads regardless of qualified/unqualified.
Converted to Orders	Sum of Leads converted to orders based on aggregate. $((\text{total orders of all statuses}) / (\text{open} + \text{closed leads})) * 100$
Orders Booked	The dollar amount of the sum of orders booked based on the aggregate.

Table B–40 Campaign to Order Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.9 Campaigns by Activity Report

This report summarizes Campaign information per Activity.

Table B–41 Campaigns to Activity Columns

Column Name	Description
Activity	Activity name.

Table B–41 Campaigns to Activity Columns

Column Name	Description
Count	This is the number of Campaigns associated to this activity during the period.
Target Audience	The total target audience for this Activity during the period.
Lead	Total number of leads created against the campaigns during the period, excluding dead leads.
Lead Amount	The sum of lead amount of all leads created against the campaigns during the period.
Opportunities	Total number of opportunities created against the campaigns during the period.
Opportunity Amount	The sum of opportunity amount of all opportunities created against the campaigns during the period.

Table B–42 Campaigns to Activity Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.10 Campaign Budget Amount by Activity Type Report

This report summarizes Budget information per Activity Type.

Table B–43 Campaigns by Budget Amount by Activity Type Columns

Column Name	Description
Campaign Name	Campaign name.
Activity Type	Activity Type name.
Activity	Activity name.
Business Unit	Business Unit name.
Approved Budget Amount	The total budget amount allocated to the Activity by approved budget lines.
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Activity.

Table B–44 Campaigns by Budget Amount by Activity Type Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.11 Campaigns by Leads and Opportunities Report

This report summarizes Lead and Opportunity information per Campaign.

Table B–45 Campaigns by Leads and Opportunities Columns

Column Name	Description
Campaign Name	Campaign name.
Targeted Customers	The total target audience for this Activity during the period.
Lead	Total number of leads created against the campaigns during the period, excluding dead leads.
Lead Amount	The sum of Lead amount of all leads created against the campaigns during the period.
Opportunities	Total number of opportunities created against the campaigns during the period.
Opportunity Amount	The sum of opportunity amount of all opportunities created against the campaigns during the period.

Table B–46 Campaigns by Leads and Opportunities Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.12 Completed Web Surveys by Campaign Report

This report summarizes web surveys information by campaign.

Table B–47 Completed Web Surveys Columns

Column Name	Description
Campaign	Name of the campaign.
First Defined Grade	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type: Grade.
Second Defined Grade	N/A
Third Defined Grade	N/A
Others	Total of remaining grades during the period.
Total	Total number of web surveys during the period.

Table B–48 Completed Web Surveys Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.13 Completed Web Surveys by Region Reports

This report summarizes web surveys information by region.

Table B–49 Completed Web Surveys Columns

Column Name	Description
Region	Name of the region.
First Defined Grade	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type: Grade.
Second Defined Grade	N/A
Third Defined Grade	N/A
Others	Total of remaining web surveys during the period.
Total	Total number of web surveys during the period.

Table B–50 Completed Web Surveys Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.14 Conversion Rates by Sales Group Report

This report summarizes rate of lead conversion to opportunities, quotes and orders by sales group.

Table B–51 Conversion Rates by Sales Group Columns

Column Name	Description
Sales Group	Name of the Sales Group.
Total Count	Sum of total leads corresponds to that sales group during the period.
Opportunities	Total leads converted to opportunities during the period.
Quotes	Total leads converted to Quotes during the period.
Lead to Opportunities %	The number of opportunities divided by total leads multiplied by 100.
Opportunities to Quotes %	The number of quotes divided by total opportunities multiplied by 100.
Quotes to Orders %	The number of orders divided by total quotes multiplied by 100.

Table B–52 Conversion Rates by Sales Group Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

Table B–52 Conversion Rates by Sales Group Parameters

Parameter Name	Description
Fixed Calculation Period	■ Data can be aggregated by period. Default is Quarter. ■ Daily - Last 24 hours (Last refresh date) ■ Weekly - Start of week to current date, up to 7 days. Week begins on a Sunday. ■ Monthly - Start of month, up to 30 days. ■ Quarterly - Start of current quarter, up to current date. ■ Yearly - Start of current fiscal year, up to current date. Examples: ■ Daily 9-Nov-01 to 10-Nov-01 ■ Weekly 4-Nov-01 to 10-Nov-01 ■ Monthly 1-Nov-01 to 10-Nov-01 ■ Quarterly 1-Sep-01 to 10-Nov-01 ■ Yearly 1-Jun-01 to 10-Nov-01

B.2.15 Event Cost and Revenue Report

This report summarizes Costs and Revenues per event.

Table B–53 Event Cost and Revenue Report Columns

Column Name	Description
Event	Event Name
Total Cost	Period-to-date cost which is the cumulative amount of the approved budget for the period.
Total Revenue	Period-to-date revenue which is the cumulative amount of revenue for the period. This is booked order in the CRM schema for actual revenue.
Registration Count	The sum of registrations for the period.
Cost per Registration	Total approved budget amount for the events for the activity divided by the number of cumulative registrations.
Revenue per Registration	The sum of the revenue for that period divided by the sum of registrations for that period.
Lead Count	Total number of leads created against the campaigns during the period, excluding dead leads.

Table B–53 Event Cost and Revenue Report Columns

Column Name	Description
Cost per Lead	The sum of Period-to-date costs divided by the sum of Lead Count.
Revenue per Lead	The sum of the revenue for that period divided by the sum of leads for that period.
Order Count	The number of booked orders.
Cost Per Order	The total booked order amount divided by the numbers of orders booked.
Revenue per Order	The sum of the revenue for that period divided by the sum of orders for that period.

Table B–54 Event Cost and Revenue Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

Table B–54 Event Cost and Revenue Parameters

Parameter Name	Description
Fixed Calculation Period	Data can be aggregated by period. Default is Quarter. ■ Daily - Last 24 hours (Last refresh date) ■ Weekly - Start of week to current date, up to 7 days. Week begins on a Sunday. ■ Monthly - Start of month, up to 30 days. ■ Quarterly - Start of current quarter, up to current date. ■ Yearly - Start of current fiscal year, up to current date. Example: Current date is November 10, 2001 ■ Daily 9-Nov-01 to 10-Nov-01 ■ Weekly 4-Nov-01 to 10-Nov-01 ■ Monthly 1-Nov-01 to 10-Nov-01 ■ Quarterly 1-Sep-01 to 10-Nov-01 ■ Yearly 1-Jun-01 to 10-Nov-01

B.2.16 Event Cost, Revenue and ROI Report

This report summarizes Costs, Revenues and Return on Investments per Event.

Table B–55 Event Cost, Revenue and ROI Report Columns

Column Name	Description
Actual Cost	Period to-date cost which is the cumulative amount of the approved budget for the period.
Forecasted Cost	From Metrics value. Summarize schedule cost and the parent cost.
Cost Variance	$((\text{actual} - \text{forecast}) / \text{forecast}) * 100$
Actual Revenue	Booked order amount in Oracle Quoting.
Forecasted Revenue	From Metrics value. Summarize schedule revenue and the parent revenue.
Revenue Variance	$((\text{actual} - \text{forecast}) / \text{forecast}) * 100$
Actual ROI	$((\text{actual revenue} - \text{actual cost}) / \text{actual cost}) * 100$
Forecasted ROI	$((\text{forecast revenue} - \text{forecast cost}) / \text{forecast cost}) * 100$
ROI Variance	$((\text{actual} - \text{forecast}) / \text{forecast}) * 100$

Table B–56 Event Cost, Revenue and ROI Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions
Period	Data can be aggregated by period. Default is Current Quarter. ■ A list of last 4 fiscal Years ■ A list of last 16 quarters

B.2.17 Events by Budget Amount Report

This report summarizes Budget information per Event.

Table B–57 Events by Budget Amount Columns

Column Name	Description
Event	Event name.
Type	Event Type name.
Business Unit	Business Unit name.
Approved Budget Amount	The total budget amount allocated to the Event by approved budget lines.
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Event.

Table B–58 Events by Budget Amount Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.18 Events by Event Type Report

This report summarizes Budget and Event information per Event Type.

Table B–59 Events by Event Type Columns

Column Type	Description
Event Type	Event Type name.
Number of Events	The number of Events associated with this Event Type.
Approved Budget Amount	The total budget amount allocated to the Event by approved budget lines.
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Event.
Registrants	The sum number of registrations for this event type for the period.
Attendees	The sum number of attendees for this event type for the period.
Cancellations	The sum number of cancellations for this event type for the period.

Table B–60 Events by Event Type Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.19 Leads by Opportunity Report

This report summarizes Leads and Opportunities information per Event.

Table B–61 Leads by Opportunity Columns

Column Name	Description
Event	Event name.
Leads	Total number of leads created against the campaigns during the period, excluding dead leads.
Lead Amount	The sum of Lead amount of all leads created against the campaigns during the period.
Opportunities	Total number of opportunities created against the campaigns during the period.
Opportunity Amount	The sum of opportunity amount of all opportunities created against the campaigns during the period.

Table B–62 Leads by Opportunity Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.20 Events by Registrants Report

This report summarizes Registration information per Event

Table B–63 Events by Registrants Columns

Column Name	Description
Event Name	Event name.
Registrants	The sum number of registrations for this event type for the period.
Attendees	The sum number of attendees for this event type for the period.
Cancellations	The sum number of cancellations for this event type for the period.

Table B–64 Events by Registrants Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.

Table B–64 Events by Registrants Parameters

Parameter Name	Description
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.21 Invalid Leads by Reason Report

This report summarizes invalid leads by reason.

Table B–65 Invalid Leads by Reason Columns

Column Name	Description
Reason	Reason for failure.
Invalid	Total leads which failed to import during the period.

Table B–66 Invalid Leads by Reason Parameters

Parameters	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.22 Invalid Web Surveys by Reason Report

This report summarizes invalid web surveys by region.

Table B–67 Invalid Web Surveys by Reason Columns

Column Name	Description
Reason	Reason for failure.
Invalid	Total number of web surveys which failed to import.

Table B–68 Invalid Web Surveys by Reason Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.23 Lead Aging by Quality Reports

This report summarizes leads by aging by rank.

Table B–69 Leads Aging by Quality Reports Columns

Column Name	Description
Rank	Name of the Sales Rank
0-1	Leads generated from 0 to 1 day from the last refresh date.
2-3	Leads generated between 2 and 3 days from the last refresh date.

Table B–69 Leads Aging by Quality Reports Columns

Column Name	Description
3-7	Leads generated between 3 and 7 days from the last refresh date.
8-14	Leads generated between 8 and 14 days from the last refresh date.
15-21	Leads generated between 15 and 21 days from the last refresh date.
22-28	Leads generated between 22 and 28 days from the last refresh date.
29-35	Leads generated between 29 and 35 days from the last refresh date.
36-42	Leads generated between 36 and 42 days from the last refresh date.
> 43	Leads generated 43 days and beyond from the last refresh date.
Total	Total leads generated since the last refresh date.

Parameters

None

B.2.24 Lead Aging by Sales Group Report

This report summarizes leads by aging by sales group.

Table B–70 Leads Aging by Sales Group Columns

Column Name	Description
Sales Group	Name of the Sales Group.
0-1	Leads generated from 0 to 1 day from the last refresh date.
2-3	Leads generated between 2 and 3 days from the last refresh date.
3-7	Leads generated between 3 and 7 days from the last refresh date.
8-14	Leads generated between 8 and 14 days from the last refresh date.
15-21	Leads generated between 15 and 21 days from the last refresh date.
22-28	Leads generated between 22 and 28 days from the last refresh date.
29-35	Leads generated between 29 and 35 days from the last refresh date.
36-42	Leads generated between 36 and 42 days from the last refresh date.
> 43	Leads generated 43 days and beyond from the last refresh date.
Total	Total leads generated since the last refresh date.

Parameters

None

B.2.25 Lead Assignment and Conversion by Sales Group Reports

This report summarizes lead assignment and conversion by sales group.

Table B-71 Lead Assignment and Conversion by Sales Group Columns

Column Name	Description
Sales Group	Name of the Sales Group.
Total Count	Sum of total leads corresponds to that sales group during the period.
Changed Count	Total number of assigned leads that are actually updated by sales rep during the period.
Changed %	The number of changed leads divided by assigned leads multiplied by 100.
Unchanged Count	Total leads that are assigned but not updated by sale rep during the period.
Unchanged %	The number of unchanged leads divided by assigned leads multiplied by 100.
Open Leads	Total leads in open status during the period.
Dead Leads	Total leads in dead status during the period.
Converted to Opportunities	Total leads converted to opportunities during the period.
Converted to Opportunities %	The number of opportunities divided by total leads multiple by 100.

Table B-72 Lead Assignment and Conversion by Sales Group Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.

Table B–72 Lead Assignment and Conversion by Sales Group Parameters

Parameter Name	Description
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions
Fixed Calculation Period	■ Data can be aggregated by period. Default is Quarter. ■ Daily - Last 24 hours (Last refresh date) ■ Weekly - Start of week to current date, up to 7 days. Week begins on a Sunday. ■ Monthly - Start of month, up to 30 days. ■ Quarterly - Start of current quarter, up to current date. ■ Yearly - Start of current fiscal year, up to current date. Examples: ■ Daily 9-Nov-01 to 10-Nov-01 ■ Weekly 4-Nov-01 to 10-Nov-01 ■ Monthly 1-Nov-01 to 10-Nov-01 ■ Quarterly 1-Sep-01 to 10-Nov-01 ■ Yearly 1-Jun-01 to 10-Nov-01

B.2.26 Lead Import Statistics by Campaign Report

This report summarizes lead import statistics by campaign.

Table B–73 Lead Import Statistics by Campaign Columns

Column Name	Description
Campaign	Name of the campaign.
Added	Total of valid, invalid and new leads.
Valid	Total leads imported successfully during the period.
Invalid	Total lead import failures during the period.
New	Total Leads imported during the period.

Table B–74 Lead Import Statistics by Campaign Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.27 Lead Import Statistics by Region Report

This report summarizes lead import statistics by region.

Table B–75 Lead Import Statistics by Region Columns

Column Name	Description
Region	Name of the Region.
Added	Total of valid, invalid and new leads.
Valid	Total leads imported successfully during the period.
Invalid	Total lead import failures during the period.
New	Total Leads imported during the period.

Table B–76 Lead Import Statistics by Region Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.

Table B–76 Lead Import Statistics by Region Parameters

Parameter Name	Description
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.28 Lead Quality by Campaign Report

This report summarizes leads by rank by campaign.

Table B–77 Lead Quality by Campaign Columns

Column Name	Description
Campaign	Name of the Campaign
First Defined Rank	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Rank.
Second Defined Rank	N/A
Third Defined Rank	N/A
Others	The total of the leads in the remaining ranks.
Total	Total leads by all ranks during the period.

Table B–78 Lead Quality by Campaign Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.

Table B–78 Lead Quality by Campaign Parameters

Parameter Name	Description
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.29 Lead Quality by Region Report

This report summarizes leads by rank by region.

Table B–79 Lead Quality by Region Columns

Column Name	Description
Region	Name of the Region.
First Defined Rank	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Rank.
Second Defined Rank	N/A
Third Defined Rank	N/A
Others	The total of the leads in the remaining ranks
Total	Total leads by all ranks during the period.

Table B–80 Lead Quality by Region Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.

Table B–80 Lead Quality by Region Parameters

Parameter Name	Description
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.30 Lead Quality by Status Report

This report summarizes leads by rank by status.

Table B–81 Lead Quality by Status Columns

Column Name	Description
Status	Name of the Status
Status Flag	Flag to determine if the status is yes or no.
First Defined Rank	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Rank.
Second Defined Rank	N/A
Third Defined Rank	N/A
Others	The total of the leads in the remaining ranks.
Total	Total leads by all ranks during the period.

Table B–82 Lead Quality by Status Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.

Table B–82 Lead Quality by Status Parameters

Parameter Name	Description
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.31 Lead Sources by Campaign Report

This report summarizes leads by source then by campaign.

Table B–83 Lead Sources by Campaign Columns

Column Name	Description
Campaign	Name of the Campaign.
First Defined Source	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Source.
Second Defined Source	N/A
Third Defined Source	N/A
Others	The total of the leads from the remaining sources.
Total	Total leads by all sources during the period.

Table B–84 Lead Sources by Campaign Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.

Table B–84 Lead Sources by Campaign Parameters

Parameter Name	Description
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.32 Lead Sources by Region Report

This report summarizes leads by source by region.

Table B–85 Lead Sources by Region Columns

Column Name	Description
Region	Name of the Region
First Defined Source	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Source.
Second Defined Source	N/A
Third Defined Source	N/A
Others	The total of the leads from the remaining sources.
Total	Total leads by all sources during the period.

Table B–86 Lead Sources by Region Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.

Table B–86 Lead Sources by Region Parameters

Parameter Name	Description
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.33 Lead Sources by Status Report

This report summarizes leads by source and then by status.

Table B–87 Lead Sources by Status Report Columns

Column Name	Description
Status	Name of the Status.
Open	Flag top determine if the status is yes or no.
First Defined Source	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Rank.
Second Defined Source	N/A
Third Defined Source	N/A
Others	The total of the leads from the remaining sources.
Total	Total leads by all sources during the period.

Table B–88 Lead Sources by Status Report Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.34 Lead Status by Campaign Report

This report summarizes leads by status then by campaign.

Table B–89 Lead Status by Campaign Report Columns

Column Name	Description
Campaign	Name of the Campaign.
First Defined Status	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Status.
Second Defined Status	N/A
Third Defined Status	N/A
Others	The total of the leads from the remaining statuses.
Total	Total leads by all statuses during the period.

Table B–90 Lead Status by Campaign Report Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.35 Responses by Activity Report

This report summarizes response information by activity.

Table B–91 Responses by Activity Columns

Column Name	Description
Activity	Activity Name.
Number of Campaigns	Total number of campaigns belonging to that activity during the period.
Target Audience	Total targeted audience for this activity during the period.
Responses Added	Total number of responses added for the activity during the period.
Responses Change	Change from previous to current for the number of responses during the period.
Cost Per Response	Total approved budget amount for the campaigns for the activity divided by the number of cumulative responses during the period.
Responses Forecast	Total number of responses forecasted during the period.
Responses Variance	$((\text{Actual} - \text{Forecast}) / \text{Actual}) * 100$

Table B–91 Responses by Activity Columns

Column Name	Description
Conversion to Lead Count	Total number of responses converted to leads during the period.
Conversion to Lead Change	Change from previous to current for the number of responses converted to leads during the period.
Cost Per Lead	Sum of period-to-date cost divided by total leads during the period.

Table B–92 Responses by Activity Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.2.36 Responses by Campaign Report

This report summarizes response information by campaign.

Table B–93 Responses by Campaign Columns

Column Name	Description
Campaign	Campaign Name.
Target Audience	Total targeted audience for this campaign during the period.
Responses Added	Total number of responses added for the campaign during the period.

Table B–93 Responses by Campaign Columns

Column Name	Description
Responses Change	Change from previous to current for the number of responses during the period.
Cost Per Response	Total approved budget amount for the campaigns divided by the number of cumulative responses during the period.
Responses Forecast	Total number of responses forecasted during the period.
Responses Variance	$((\text{Actual} - \text{Forecast}) / \text{Actual}) * 100$
Conversion to Lead Count	Total number of responses converted to leads during the period.
Conversion to Lead Change	Change from previous to current for the number of responses converted to leads during the period.
Cost Per Lead	Sum of period-to-date cost divided by total leads during the period.

Table B–94 Responses by Campaign Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in JTF locations with location type 'COUNTRY'. User can choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
Scale by	Scale the amount columns by user choice. Available options: ■ Units ■ Hundreds ■ Thousands ■ Millions

B.3 Home Page Charts

In order for the charts to display, your server must be configured as follows:

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

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

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

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

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

The following is a list of charts available for display on the Oracle Marketing home page:

Table B–95 Home Page Charts

Chart Name	Description	Section Location
Budget Utilization by Business Unit	Summarizes the top ten budgets by Business Unit	Section B.3.1, "Budget Utilization by Business Unit Chart"
Budget Utilization by Category	Summarizes the top ten budgets by Category	Section B.3.2, "Budget Utilization by Category Chart"
Campaigns by Leads	Summarizes the top ten campaigns by leads	Section B.3.3, "Campaigns by Leads Chart"
Campaign by Opportunity	Summarizes the top ten campaigns by opportunities	Section B.3.4, "Campaign by Opportunity Chart"

Table B–95 Home Page Charts

Events by Attendance	Summarizes the top ten events by attendance	Section B.3.5, "Events by Attendance Chart"
Events by Leads	Summarizes the top ten events by leads	Section B.3.6, "Events by Leads Charts"
Events by Registration	N/A	Section B.3.7, "Events by Registrations Chart"
Lead to Opportunity	N/A	Section B.3.9, "Lead to Opportunity Chart"

B.3.1 Budget Utilization by Business Unit Chart

This chart summarizes the top ten Budgets by Business Unit.

Table B–96 Budget Utilization by Business Unit Columns

Column Name	Description
Budget	Budget information.
Business Unit	Business Unit name.

Table B–97 Budget Utilization by Business Unit Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
	No prearrangers available at this time.

B.3.2 Budget Utilization by Category Chart

This chart summarizes the top ten Budgets by Category.

Table B–98 Budget Utilization by Category Columns

Column Name	Description
Budget	Budget information.
Category	Category name.

Table B–99 Budget Utilization by Category Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
	No prearrangers available at this time.

B.3.3 Campaigns by Leads Chart

This chart summarizes the top ten Campaigns by Leads.

Table B–100 Campaigns by Leads Columns

Column Name	Description
Campaign	Campaign name.
Leads	The number of leads to Campaign.

Table B–101 Campaigns by Leads Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.

Table B–101 Campaigns by Leads Parameters

Parameter Name	Description
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
	No prearrangers available at this time.

B.3.4 Campaign by Opportunity Chart

This chart summarizes the top ten Campaigns by Opportunities.

Table B–102 Campaign by Opportunity Columns

Column Name	Description
Campaigns	Campaign Name
Opportunities	Opportunities

Table B–103 Campaign by Opportunity Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
	No prearrangers available at this time.

B.3.5 Events by Attendance Chart

This chart summarizes the top ten Events by Attendance.

Table B–104 Events by Attendance Columns

Column Name	Description
Events	Event name.
Attendance	The number of attendees to the Event.

Table B–105 Events by Attendance Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
No prearrangers available at this time.	

B.3.6 Events by Leads Charts

This chart summarizes the top ten Events by Leads

Table B–106 Events by Leads Columns

Column Name	Description
Event	Event name.
Leads	The number of leads to Event.

Table B–107 Events by Leads Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.

Table B–107 Events by Leads Parameters

Parameter Name	Description
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
	No prearrangers available at this time.

B.3.7 Events by Registrations Chart

This chart summarizes the top ten Events by Registrations.

Table B–108 Events by Registration Columns

Column Name	Description
Event	Event name.
Registration	The number of registrations to the Event.

Table B–109 Events by Leads Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
	No prearrangers available at this time.

B.3.8 Leads and Cost Per Lead Parameters

Table B–110 *Leads and Cost per Lead Parameters*

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.
	No prearrangers available at this time.

B.3.9 Lead to Opportunity Chart

This chart summarizes the number of leads to opportunities.

Table B–111 *Lead to Opportunity Columns*

Column Name	Description
Cost Per Lead	N/A
Leads	N/A

Table B–112 *Lead to Opportunity Parameters*

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.

Glossary

This glossary provides brief descriptions of the key terms that are used in Oracle Marketing.

Activity

Sub-level of Activity Type. For example, below activity type “Advertising,” one would find “Advertising” and “e-Advertising.”

Activity Type

The types of marketing activities that can be created and defined in Oracle Marketing. For example,

- Advertising
- Direct Marketing
- Events
- Publishing
- PR/AR
- Internal Communications

Actuals

Seen on Cost Types and Metrics in Oracle Marketing and used to enter the actual costs or actual metrics

Administration

A main tab in Oracle Marketing, giving access to a variety of administrative functions

Analytics

A group of tools used to predict purchasing behavior by analyzing customers' response to a prior campaign

Approval Rule

Rules created in Oracle Marketing (and also in other parts of the Oracle E-Business Suite), to control the routing and sequence of approval requests. This means users do not manually have to select the correct approver, they simply submit for approval.

Attachment

Electronic document that can be uploaded or linked to Oracle Marketing for later download by other users

Attachment Type

When attachments are added at various levels within Oracle Marketing (for example, Campaigns and Campaign Schedules), the attachment type must be selected. Allowable values are:

- File: Any digitized file that is loaded into Oracle Marketing.
- URL: A URL that points to a file not actually loaded into Oracle Marketing.

Audience

A main tab in Oracle Marketing, giving access to all functions for contact management, list creation and management, list import, segmentation, etc.

Audience Level

This refers to the seniority or role of the targeted audience. You may select more than one option. These definitions apply equally to internal and partner audiences, as well as to customer, prospect, press or analyst audiences. Audience levels are C-Level, Developer, IS Professionals, LOB Function Management.

B2B

Business-to-Business

B2B2C

Business-to-Business-to-Consumer

B2C

Business-to-Consumer

BIS

Business Intelligence System. A module in the Oracle E-Business Suite generally used for reporting purposes.

Budget

Funds which are drawn upon to pay for campaigns, events, deliverables, offers - essentially any marketing object requiring money. Can be fixed or accrued based on sales.

Budget Adjustment Types

Types of adjustments, such as making available committed funds when a customer fails to perform.

Budget Amount (also Initial Budget Amount)

Currency and value, that is set on the Budget side navigation of an Oracle Marketing object, in the planning phase, as the object is being created.

Budget Source

Names of budgets created in Oracle Marketing, on the Budget tab. Users can request funds from various budget sources to cover costs of the campaigns and schedules, or events and schedules that they create in Oracle Marketing.

Budget Source Value

The amount being requested, or approved, from a Budget Source.

Budget Thresholds

Alerts that can be raised when a budget is being depleted too quickly or too slowly.

Business Rules

The rules and guide lines which govern how an organization uses an Oracle product.

Business Unit

A grouping of users within the application, defining the organizational structure.

Campaign

A marketing object used to track all outbound marketing activities. Campaigns are generally associated with a marketing medium.

Campaign Schedule

Campaign Schedules are created below Campaigns, to define actual marketing activities that will be executed. These executions may include direct marketing, advertising, PR/AR etc., as well as events.

Categories

Method for grouping like marketing objects.

CCM

Concurrent Manager. For example, approvals workflow requests are batched and then handled by concurrent manager programs.

CDS

Core Data Set

Claim Actions

Actions that are take to resolve a claim.

Claim Reasons

Reasons a claim is filed. Claim reasons have claim actions associated with them. This allows an organization to create a prescribed course of action for a claim of a certain type.

Claims

An accounting request for money or credit based on an offer or promotion that has been executed by the retailer.

Claim System Parameters

A collection of settings that govern how claims are processed by the system.

Claim Types

Describe different claims

COGS

Cost of Goods Sold

Content Item

A specific instance of a content type. A merchant can create any number of content items that belong to a content type. Example: Product is a content type, a laptop computer is a content item.

Content Type

An eMerchandising term. Example: Products, Campaigns, Product Reviews.

Cost

Expenditure incurred by marketing and sales activities. Can be paid immediately, or accrued and paid later.

Cost Type

A breakdown of pre-specified cost on each Oracle Marketing object. For example, within a total budget value of \$20,000, cost types may be allocated as \$10,000 on Mail List Buy and \$10,000 on Production/Creative.

CRM

Customer Relationship Management

Custom Setups

A group of settings that can be applied to a marketing object. This allows the user to configure many aspects of a marketing object with one selection.

Customer Master Record(s) (also known as Customer Master Files)

The actual records of customers, prospects, partners, vendors, etc. that are in the Trading Community Architecture stored within the Oracle E-Business Suite. These records are shared across all the modules in the suite.

CSV

A comma delimited data file type

Data Mining

Functionality allows Oracle Marketing to analyze previous campaigns to spot trends and generate analytical reports.

Data Sources

Field maps for external data sources

DBA

Database Administrator

Deduplication

To remove duplicate records from a list, the entries are compared based on the deduplication rules specified in the Administration tab. Use of Word Standardization improves the completeness of the deduplication process. (See Word Standardization.)

Deliverables

Hard or soft collateral (marketing materials).

Discoverer

Oracle's data query tool

Display Priority

A business attribute of the posting's content type used to prioritize the recommended content for display, based on business objectives. Example: prioritize the recommended products based on price, and display the highest priced product.

DNC

Do Not Contact. A flag in marketing databases and lists indicating people who do not wish to be contacted.

eMerchandising

A group of methodologies used to configure websites according to customer preferences and anticipated interests.

ERP

Enterprise Resource Planning

EUL

End User Layer. The EUL provides a methodology for questioning a database without having to know query language, or database terminology or structure.

Event

Marketing activities that are associated with a particular location.

Event Promotion

A specific type of Campaign that may be created in Oracle Marketing to promote an Event. It will contain a Campaign Schedule, detailing the executions, and will be linked to the Event.

Event Schedule

Event Schedules are created below Events, representing each occurrence of the Events (i.e., Boston on 22 May 02, Tokyo on 01 Jun 02, and so on).

Geography

A side navigation link in Oracle Marketing that allows users to define the geographical area (country, region, sub region, state, and city) in which an Oracle Marketing object will be executed.

GUI

Graphical User Interface

Import

A link under the main Audience Tab, giving access to List Import functionality.

Initial Budget Amount

See Budget Amount

Interaction

Any interaction (or touch point) with a customer or prospect. For example, contacts may be targeted, and they may respond, register, attend, and evaluate (dependent upon the activity type). Interactions may later be qualified and rated, and may become leads.

Interaction Import

A functionality in Oracle Telesales that will allow interactions and/or new customer/prospect records to be imported from pre-defined format flat files into customer master records.

Intersect

A value used in List Build and Selection. Use this option to create a selection that includes only the intersect (overlap) of two chosen lists.

iStore

An Oracle product designed for producing electronic commerce websites.

JSP

Java Server Page

JTF

Java Technical Foundation

Lead

A qualified sales opportunity that results from a marketing or sales activity.

Lists

Lists of customers or prospective customers that may have demographic or previous purchase history information associated with the people or companies on the list.

List Import

A function in which external data, such as a rented or purchased list, may be permanently or temporarily added to an organization's internal customer and prospect data.

List Import Table

A database table where records imported from a rented or purchased list are stored. Records may be added to TCA from the List Import Table.

Locking Rules

Determine which fields of particular attributes of a marketing object are locked from update once they are created.

LOV

List of Values

Mandatory Rules

Determine which fields belonging to a marketing object are required.

Marketing Mediums

Execution channels, such as radio, newspaper, or television, through which marketing campaigns are conducted.

Marketing Object

See *Object*.

Merchandising Strategy

An algorithm used to select personalized content items (including products, offers, ads, product reviews) for display on a web site.

MES

Marketing Encyclopedia System, a module in the Oracle E-Business Suite

Metric(s)

Measurement devices for responses, costs, and revenues.

MLS

Multi-lingual Support

MRP

Manufacturing Resource Planning, a module in the Oracle E-Business Suite

Multi Org

Used to describe the capabilities of the Oracle E-Business Suite in dealing with multiple organizations/languages/currencies, etc.

Note Type

Allows users to classify “Notes” created in Oracle Marketing by their type.

Object

Oracle Marketing uses the term “object” to refer to various building blocks used in the application. These include:

- Programs
- Campaigns
- Campaign Schedules
- Events
- Event Schedules
- One-Off Events
- Deliverables
- Products
- Offers

OC or OM

Order Capture or Order Management, a part of the Oracle E-Business Suite allowing orders to be created and passed for fulfillment.

Offer

A discount for purchasing products or services. Offers come in various types and are used as inducements to increase sales of particular products or services or groups of products or services.

One-Off Event

An “event” type object in Oracle Marketing, used to define an event taking place once, in one location only. This allows the user to create an event schedule, without first having to create an event (or a Campaign) plus a schedule.

Opportunity

A sales opportunity, created in OSO, OTS and other sales applications.

Oracle Advanced Outbound

A product used to preprocess marketing campaigns for Oracle Telesales.

Organization

A company (or other logical grouping of contacts) in TCA

Owner

The name of the person within Oracle who owns or is responsible for the Oracle Marketing object.

Page

A logical entity describing a JSP template or an HTML page. In eMerchandising, Page identifies a placement.

Personalize

A function that allows an Oracle Marketing user to personalize many screens, to produce a listing of chosen columns only, and/or to filtered or select specific data only.

PHP

Personal Home Page.

Placement

An object representing a space on the site for displaying content. A placement is typically associated with a posting that defines the content to be displayed in the space. It contains the following information:

- Site (Example: iStore)
- Page on the site (Example: product details page)
- Location on the page (Example: top right corner)
- Style information (Example: Full Banner style)

Posting

An object representing the way content is selected. There are two types of postings: universal and rule-based.

Product

A main tab in Oracle Marketing, giving access to create and manage products, product hierarchies, and product pricing in the Oracle E-Business Suite.

Product Family

A value in several pick lists, giving a choice of products. Messages, campaigns, events and deliverables may all be associated with specific product families.

Program

A rollup folder to group together campaigns and events. Any number of programs can be created, to produce a program hierarchy.

Related Products

Related products are user-defined links between different products. You can associate an unlimited number of product relations. Related products are used by various Oracle applications. For example, a call center agent using Oracle TeleSales can use related products to identify cross-sell or up sell opportunities, and prerequisites.

Response

A response can be any communication back from a customer or prospect. After qualification, a response can become a lead. A response that cannot be qualified as a lead can be further targeted with lead maturation programs.

ROI

Return on Investment.

Rollup Cost

A cost metric that is composed of, or calculated as a sum of, other cost metrics.

Rollup Metric

A metric that is composed of, or calculated as a sum of, other metrics.

Rule

A set of conditional statements, merchandising strategy and a rule priority. The merchandising strategy is triggered if all conditional statements are true.

Rule-based Posting

A rule-based posting consists of several rules. Use it to apply different merchandising strategies to different situations as described by the rules conditions.

Segment

Segments represent specific sub-divisions of the total audience.

SIC

Standard Industrial Classification.

Source Code

The unique code number assigned to each Campaign, Campaign Schedule, Event or Event Schedule within Oracle Marketing. Source Codes are associated with all interactions, and are used in Oracle Leads Management

SQL

Structured Query Language

Status

Seen in many places within Oracle Marketing, the Status field shows where the campaign, event, schedule, deliverable is in the approvals process. Actual values within the pick list vary dependent upon the object.

Style

Styles define the look and feel used to render content items that are displayed in a placement. Styles are associated with an XSL stylesheet that converts the XML output of the eMerchandising engine into HTML.

Target Products

Some campaigns may have target products associated with them (Example: a product discount), while others may not. Example: Oracle brand awareness campaign.

Targeting Conditions

Conditional statements used to target merchandising strategies to specific users. Targeting conditions may be based on the type of visitor, shopping cart total amount and belonging of a visitor to a segment or a list.

Trading Community Architecture (TCA)

The Oracle customer model (or schema), that serves as a single repository for all data about organizations, customers, contacts, partners, vendors, and relationships.

UI

User Interface

Universal Posting

Unlike the rule-based postings, universal postings apply the same merchandising strategy to all the visitors.

UOM

Unit of Measure

URL

Universal Resource Locator

VAD

Value Added Distributor

Venue

A specific location that is generally associated with an event.

Word Replacement Rules

Rules that govern the comparison of entries during list import to determine whether a duplicate entry is being imported.

Word Standardization (*sometimes referred to as Word Replacement*)

In order to successfully deduplicate a list, words such as street identifiers (Avenue = Ave), first names (William = Bill), and States (California = CA) will be temporarily standardized for the purposes of comparison. The use of Word Standardization does not change the text of the actual records. Names of organizations may similarly be temporarily standardized.

Workbook

A term used in Discoverer. A workbook represents selection criteria that will be applied against records in the database.

Workflow

Oracle Workflow is a product using to track and relay approvals and notifications according to business rules.

Worksheet

A spreadsheet of customers or prospects, or both, extracted from a database by Oracle Discoverer.

YOY

Year over Year / Year on Year.

Index

A

- Administration tab
 - description, A-13
- Advanced Outbound
 - creating a campaign schedule with, 2-110
- Analytics tab
 - description, A-14
- Approvals
 - budget, 2-41
 - initiating, 2-162
 - notes, 2-43
 - overview, 2-41
 - previewing, 2-42
 - process description, 2-162
 - requests, 2-42
 - rule search, 2-43
 - theme, 2-41
 - understanding, 2-41
 - viewing, 2-42
- Attachments
 - about, 2-58
- Audience management
 - new features and enhancements, 1-8
- Audience tab
 - description, A-7

B

- Bins
 - descriptions, B-2 to B-24
- Buckets, 2-34
- Budget requests
 - removing from campaign schedules, 2-106

- Budget tab
 - description, A-13
- Budget thresholds
 - adding, 2-159
- Budget transfers
 - creating from a budget, 2-154
 - creating from a marketing object, 2-153
- Budgets
 - access privileges, 2-38
 - activating, 2-160
 - adding a threshold, 2-159
 - administration, 2-35
 - approval rules, 2-38
 - buckets, 2-34
 - campaign checkbooks, 2-34
 - categories, 2-40
 - copying, 2-41, 2-161
 - creating a fixed budget, 2-147
 - creating allocations, 5-93
 - creating and managing, 2-146 to 2-162
 - creating budget requests for a marketing object, 2-150
 - creating budget requests from a budget, 2-152
 - creating budget transfers from a budget, 2-154
 - creating budget transfers from a marketing object, 2-153
 - creating fully accrued budgets, 5-98
 - creating offer budgets, 2-143
 - custom setup, 2-36
 - deleting, 2-40, 2-161
 - fixed, 2-31
 - for deliverables, 2-44
 - locking rules, 2-36
 - mandatory rules, 2-36

- market eligibility, 2-32
- overview, 2-30
- product eligibility, 2-33
- reconciliation, 2-33
- reconciling, 2-157
- requests, 2-33
- rollup view, 2-35
- security, 2-38
- sourcing for campaign schedules, 2-105
- status descriptions, 2-37
- system parameters, 2-36
- system status, 2-37
- threshold alerts, 2-40
- transferring funds from a campaign
 - schedule, 2-107
- transfers, 2-33
- understanding, 2-30
- updating during top-down, bottom-up
 - process, 5-100
- updating for campaign schedules, 2-108
- updating market eligibility for fixed
 - budgets, 2-148
- updating market eligibility for fully accrued
 - budgets, 5-99
- updating products for fixed budgets, 2-149
- updating products for fully accrued
 - budgets, 5-100
- user status, 2-38
- viewing budget rollup, 2-159
- viewing the customer checkbook, 2-158
- viewing utilized, 2-156

Bundles

- creating for products and services, 2-136
- removing products from, 2-137
- specifying products for, 2-136

C

- Calendar tab
 - description, A-14
- Campaign schedules
 - adding deliverables to, 2-104
 - adding messages, 2-101
 - associating a trigger with, 2-190
 - campaign schedule costs and revenue metrics

- associating, 2-207
 - detaching, 2-212
 - entering values for, 2-211
 - viewing associated, 2-208
 - viewing charts, 2-209
 - viewing history, 2-210
 - campaign schedule metrics
 - associating, 2-202
 - detaching, 2-206
 - entering values for, 2-205
 - viewing associated, 2-202
 - viewing charts, 2-204
 - viewing history, 2-204
 - copying, 2-94
 - creating, 2-92
 - creating a target group for, 2-96
 - creating and managing, 2-91 to 2-111
 - creating with Oracle Advanced
 - Outbound, 2-110
 - modifying a target group for, 2-98
 - publishing notes, 2-122
 - removing a budget request from, 2-106
 - removing a message from, 2-102
 - removing deliverables from, 2-104
 - removing list from target group, 2-109
 - removing products from, 2-103
 - selecting products for, 2-102
 - sourcing budgets for, 2-105
 - transferring funds to a budget, 2-107
 - updating budget for, 2-108
 - viewing and editing, 2-100
 - viewing and modifying control group
 - entries, 2-99
- Campaign tab
 - description, A-10
- Campaign triggers
 - creating, 2-184
 - removing, 2-186
 - using with metrics, 2-55
 - viewing, 2-185
- Campaigns
 - adding products to, 2-90
 - associating messages with, 2-89
 - associating offers with, 2-143
 - associating with events, 2-113

- budget approval, 2-41
- campaign costs and revenue metrics
 - associating, 2-196
 - detaching, 2-201
 - entering values for, 2-200
 - viewing associated, 2-197
 - viewing charts, 2-199
 - viewing history, 2-199
- campaign metrics
 - associating, 2-191
 - detaching, 2-196
 - entering values for, 2-195
 - viewing associated, 2-192
 - viewing charts, 2-193
 - viewing history, 2-194
- checkbooks, 2-34
- copying, 2-87
- creating, 2-84
- creating and managing, 2-84 to 2-91
- entering details, 2-89
- identifying geographies, 2-90
- overview, 2-16
- processes, 2-16
- theme approval, 2-41
- understanding, 2-16
- viewing and editing, 2-88
- Categories
 - assigning to products, 2-131
- Chargebacks, 5-44, 5-59
 - settling deductions with, 5-146
- Charts
 - descriptions, B-67 to B-73
- Claim tab
 - description, A-13
- Claims
 - actions, 5-45
 - adding attachments, 5-133
 - assignment and security, 5-46
 - associated earnings, 5-50
 - associating earnings with claim lines, 5-124
 - autopay, 5-46
 - clearing duplicate, 5-62
 - creating claim lines, 5-120
 - creating debit, 5-107
 - creating notes, 5-135
 - creation, 5-41
 - customer 360 view, 5-49
 - debit claims, 5-43
 - details page, 5-49
 - editing attachments, 5-134
 - entering details for claim lines, 5-122
 - maintenance, 5-54
 - mass create, 5-46
 - mass creating, 5-109
 - notes and attachments, 5-54
 - overpayments, 5-44
 - overview, 5-40
 - ownership, 5-47
 - related documents, 5-54
 - reporting, 5-58
 - research, 5-48
 - settlement, 5-54
 - settling for related customer accounts, 5-140
 - settling promotional claims for buying groups, 5-141
 - settling with a contra charge, 5-149
 - settling with checks, 5-152
 - splitting, 5-52, 5-131
 - statuses and status transitions, 5-60
 - tasks, 5-53
 - types, 5-42
 - types and reasons, 5-45
 - updating details, 5-117
 - viewing and editing notes, 5-136
 - viewing history, 5-139
 - viewing history details, 5-157
 - viewing history line details, 5-158
 - viewing history lines, 5-158
 - viewing history tasks, 5-159
 - viewing related documents, 5-137
 - viewing reports, 5-156
 - viewing settlement history, 5-160
 - viewing source, 5-138
 - viewing the 360 customer view, 5-125
 - viewing the claims aging view, 5-156
- Click-through destinations
 - creating, 2-178 to 2-183
 - creating for e-mail, 2-178
 - creating for Web advertisements, 2-181
 - creating for Web offers, 2-182

- new features and enhancements, 1-7
- overview, 2-47
- seeded click-through actions, 2-48
- tracking, 2-50
- understanding, 2-47
- ways to create, 2-47
- Competitor products
 - creating, 2-138
 - entering details, 2-139
- Contact groups
 - understanding, 2-21
- Contra charges
 - definition, 5-44
 - settling claims with, 5-149
- Control groups
 - understanding, 2-21
 - viewing and modifying entries, 2-99
- Costs and revenue metrics
 - associating and managing, 2-191 to 2-240
 - campaign cost and revenue metrics
 - associating, 2-196
 - detaching, 2-201
 - entering values for, 2-200
 - viewing associated, 2-197
 - viewing charts, 2-199
 - viewing history, 2-199
 - campaign schedule cost and revenue metrics
 - associating, 2-207
 - detaching, 2-212
 - entering values for, 2-211
 - viewing associated, 2-208
 - viewing charts, 2-209
 - viewing history, 2-210
 - event cost and revenue metrics
 - associating, 2-225
 - detaching, 2-230
 - entering values for, 2-229
 - viewing associated, 2-226
 - viewing charts, 2-227
 - viewing history, 2-228
 - event schedule cost and revenue metrics
 - associating, 2-235
 - detaching, 2-240
 - entering values for, 2-239
 - viewing associated, 2-236

- viewing charts, 2-237
- viewing history, 2-238
- program cost and revenue metrics
 - detaching, 2-220
 - viewing associated, 2-216
 - viewing charts, 2-218
 - viewing history, 2-218
- understanding, 2-50
- Customer checkbook
 - viewing, 2-158

D

- Data mining
 - models
 - about data sources and targets, 4-5
 - attachments, 4-30
 - attribute importance chart, 4-11
 - building, 4-7, 4-16
 - copying, 4-34
 - creating, 4-16
 - evaluating build results, 4-33
 - evaluation, 4-8
 - improving results, 4-12
 - lift chart, 4-8
 - notes, 4-31
 - performance matrix report, 4-10
 - scheduling a build, 4-26
 - scoring a target population, 4-13, 4-35
 - searching for, 4-49
 - seeded target fields and data sources, 4-6
 - status descriptions, 4-28
 - tasks, 4-32
 - teams, 4-32
 - training data, 4-6
 - types, 4-4
 - viewing and modifying, 4-27
 - viewing build logs, 4-50
 - new features and enhancements, 1-10
 - understanding, 4-2
 - using, 4-1 to 4-50
- Data sources for lists, 2-4
- Debit claims
 - creating, 5-107
 - mass creating, 5-109

Deductions

- chargebacks, 5-44
- contra charges, 5-44
- creating (non-transaction related), 5-112
- creating (transaction related), 5-110
- invoice credit memos, 5-44
- on account credit memos, 5-44
- overview, 5-43
- previous on account credit memos, 5-44
- RMAs, 5-44
- settling with a chargeback, 5-146
- settling with a previous credit memo, 5-143
- settling with a write off, 5-147
- settling with invoice credit, 5-144
- settling with invoice tax only credit, 5-145
- settling with RMAs, 5-148
- statuses and status transitions, 5-60
- write offs, 5-44

Deliverable tab

- description, A-13

Deliverables

- adding electronic files to, 2-170
- creating, 2-163
- creating a kit, 2-169
- creating and managing, 2-163 to 2-172
- creating new versions, 2-168
- inventory options for, 2-171
- overview, 2-43
- specifying for a campaign, 2-167
- understanding, 2-43
- usages, 2-45
- viewing and editing, 2-167
- with budgets, 2-44

Discount rules

- setting up, 5-68

E

eMerchandising

- associated placements, 3-12
- benefits of, 3-2
- concepts, 3-2 to 3-18
- content type categories, 3-3
- content types for postings, 3-7
- creating universal postings, 3-25

- creating Web advertisements, 3-19

- creating Web offers, 3-21

- deleting postings, 3-34

- display priority, 3-9

- extending, 3-18

- maximum items returned, 3-7

- new features and enhancements, 1-9

- personalizing content, 3-4

- product recommendations, 3-3

- rule-based postings, 3-6

- runtime actions for universal postings, 3-12

- strategy, 3-7

- custom, 3-8

- manual selection, 3-7

- predefined relationships, 3-7

- targeting rules, 3-10

- troubleshooting, 3-38

- types of content displayed, 3-5

- understanding Web postings, 3-6

- universal postings, 3-6

- using, 3-1 to 3-40

- using stylesheets, 3-5

- using the associated placements page, 3-35

- Web advertisements, 3-3

- Web images, 3-4

- Web offers, 3-4

- Web placements, 3-15

- Web text, 3-4

Event agendas

- creating tracks and sessions for, 2-119

Event management

- new features and enhancements, 1-8

Event registrations

- sending e-mail notifications, 2-120

Event schedules

- creating, 2-116

- creating agenda tracks and sessions, 2-119

- creating and managing, 2-116 to 2-122

- entering details, 2-117

- entering event coordinators, 2-119

- event schedule costs and revenue metrics

- associating, 2-235

- detaching, 2-240

- entering values for, 2-239

- viewing associated, 2-236

- viewing charts, 2-237
 - viewing history, 2-238
- event schedule metrics
 - associating, 2-230
 - detaching, 2-235
 - entering values for, 2-234
 - viewing associated, 2-231
 - viewing charts, 2-232
 - viewing history, 2-233
- publishing notes, 2-122
- sending e-mail notifications, 2-120
- specifying an invitation list for, 2-118

Event tab

- description, A-11

Events

- adding and editing information for, 2-112
- agendas, 2-20
- associating with campaigns, 2-113
- budget approval, 2-41
- building blocks, 2-18
- creating, 2-111
- creating and managing, 2-111 to 2-116
- event costs and revenue metrics
 - associating, 2-225
 - detaching, 2-230
 - entering values for, 2-229
 - viewing associated, 2-226
 - viewing charts, 2-227
 - viewing history, 2-228
- event metrics
 - associating, 2-220
 - detaching, 2-225
 - entering values for, 2-224
 - viewing associated, 2-221
 - viewing charts, 2-222
 - viewing history, 2-223
- one off events, 2-19
- overview, 2-17
- registering for, 2-115
- registration, 2-19
- rosters, 2-20
- searching for, 2-113
- setting up registrations, 2-114
- theme approval, 2-41
- understanding, 2-17

- venues, 2-18

Execution tab

- description, A-14

F

Folders

- description of, A-2

Forecasts

- creating, 5-87
- creating new versions, 5-91
- editing, 5-91
- viewing the manufacturer's ROI, 5-91

Fulfillment rules for e-mail notifications, 2-120

G

Geographies

- identifying for campaign execution, 2-90

H

Home page

- bin reference, B-2 to B-24
- chart reference, B-67 to B-73
- description, A-4
- personalizing, 2-241 to 2-243
- report reference, B-25 to B-66

Horizontal navigation links, A-2

I

Importing

- lists, 2-7

Inventory attribute templates, 2-23

- description of seeded templates, 2-23

Invoice credit memos, 5-44

K

Kits

- creating, 2-169

L

Leads Management, 1-5

List import

- creating, 2-74
- creating and managing, 2-73 to 2-82
- error handling, 2-78
- existence checking, 2-80
 - for addresses (B2B and B2C)), 2-81
 - for organization contacts (B2B), 2-80
 - for organizations (B2B), 2-80
 - for persons (B2C), 2-81
 - original system reference logic, 2-81
- viewing, 2-78

List management business areas, 2-9

Lists

- adding manual entries, 2-71
- adding notes to, 2-72
- associating suppression lists with marketing objects, 2-68
- creating, 2-61
- creating and managing, 2-61 to 2-73
- creating custom SQL, 2-66
- data sources, 2-4
- de-duplication, 2-6
- description of generation modes, 2-69
- description of list option attributes, 2-67
- exporting, 2-71
- generating, 2-69
- generation, 2-6
- import, 2-7
- list management business areas, 2-9
- modifying main attributes, 2-62
- modifying options, 2-66
- overview, 2-3
- removing from campaign schedule target group, 2-109
- rented vs. purchased, 2-8
- searching for a person or organization, 2-73
- selection, 2-5
- suppression, 2-8
- types, 2-5
- understanding, 2-3
- viewing and modifying selections, 2-63
- viewing list entries, 2-70
- viewing logs, 2-72
- vs. Segments, 2-15

Locking rules, 2-36

M

Mandatory rules, 2-36

Manufacturer's ROI calculator

- overview, 5-9
- viewing, 5-91

Market eligibility

- updating for fixed budgets, 2-148

Market eligibility for budgets, 2-32

Marketing calendar

- description, 1-7
- understanding, 2-56

Marketing Intelligence

- overview, 2-55
- understanding, 2-55

Marketing objects

- creating budget requests for, 2-150
- creating budget transfers from, 2-153

Messages

- adding to a campaign schedule, 2-101
- associating with campaigns, 2-89
- creating, 2-172
- creating and managing, 2-172 to 2-174
- overview, 2-43
- removing from use, 2-174
- understanding, 2-43
- viewing and editing, 2-174

Metrics

- associating and managing, 2-191 to 2-240
- calculation types, 2-53
- campaign metrics
 - associating, 2-191
 - detaching, 2-196
 - entering values for, 2-195
 - viewing associated, 2-192
 - viewing history, 2-194
 - viewing metric charts, 2-193
- campaign schedule metrics
 - associating, 2-202
 - detaching, 2-206
 - entering values for, 2-205
 - viewing associated, 2-202
 - viewing charts, 2-204
 - viewing history, 2-204
- categories, 2-51

- event metrics
 - associating, 2-220
 - detaching, 2-225
 - entering values for, 2-224
 - viewing associated, 2-221
 - viewing charts, 2-222
 - viewing history, 2-223
- event schedule metrics
 - associating, 2-230
 - detaching, 2-235
 - entering values for, 2-234
 - viewing associated, 2-231
 - viewing charts, 2-232
 - viewing history, 2-233
- hierarchies, 2-51
- overview, 2-50
- program metrics
 - detaching, 2-216
 - viewing associated, 2-213
 - viewing charts, 2-214
 - viewing history, 2-215
- refresh process, 2-54
- seeded, 2-54
- templates, 2-54
- user-defined, 2-55
- using with campaign triggers, 2-55

Models

- see* Predictive models

N

Notes

- approval, 2-43
- publishing for event and campaign
 - schedules, 2-122
- understanding, 2-57

O

Offers

- adjustments, 5-85
- advanced options, 2-142, 5-82
- associating with campaigns, 2-143
- copying, 5-86
- creating, 2-141

- creating and managing, 2-141 to 2-144
- creating budgets for, 2-143
- creating with Trade Management, 5-63
- entering discount rule details, 5-74
- overview, 2-29
- performance requirements, 5-79
- requesting funding for, 5-81
- searching and viewing, 5-84
- setting up market eligibility, 5-77
- setting up qualifiers and discount rules, 5-68
- Trade Management offer types, 5-6
- Trade Management offers, 5-5
- types, 2-30
- understanding, 2-29
- viewing and editing, 2-142
- Web offers, 3-4

On account credit memos, 5-44

One off events, 2-19

Oracle Discoverer, 2-9

Oracle Discoverer business areas, 2-9

Oracle Marketing

- concepts, 2-2 to 2-59
- functional areas, 1-3
- key benefits, 1-3
- navigation links, A-2
- new features and enhancements
 - audience management, 1-8
 - click-through destinations, 1-7
 - data mining, 1-10
 - eMerchandising, 1-9
 - event management, 1-8
 - marketing calendar, 1-7
 - new performance metrics, 1-9
 - Oracle Scripting integration, 1-7
 - Trade Management, 1-11
 - usability, 1-6
- object display, A-2
- product overview, 1-2
- search functionality, A-3
- understanding the user interface, A-2
- user interface tab and link descriptions, A-4
- user procedures, 2-60 to 2-243

Oracle Scripting integration

- new features and enhancements, 1-7
- overview, 2-45

- process flow diagram, 2-46
- seeded scripts, 2-47
- understanding, 2-45
- Organizations
 - assigning to products, 2-132
- Overpayments
 - creating, 5-114
 - settling with a previous debit memo, 5-154
 - settling with a receipt write off, 5-150
 - settling with an on account cash
 - application, 5-155
 - settling with debit memos, 5-151

P

- Performance metrics
 - description of new, 1-9
- Personalized search, A-3
- Placements
 - associating with postings, 3-37
 - creating for Oracle iStore, 3-35
 - creating for other sites, 3-36
- Postings
 - content types for, 3-7
 - deleting, 3-34
 - maximum items returned, 3-7
 - rule-based, 3-6
 - targeting rules, 3-10
 - universal, 3-6
- Predictive models
 - copying, 4-34
 - creating, 4-16
 - owner, 4-28
 - scheduling a build, 4-26
 - scoring a target population, 4-35
 - statuses, 4-28
 - types, 4-4
 - understanding model building, 4-4
 - viewing and modifying, 4-27
- Previous on account credit memos, 5-44
- Price lists
 - adding products, 2-133
 - creating, 2-145
 - creating and managing, 2-145 to 2-146
 - displaying, 2-145

- editing, 2-146
- Pricing modifiers
 - controlling with offer advanced options, 2-142
- Product eligibility for budgets, 2-33
- Product relationships
 - creating, 2-134
- Product tab
 - description, A-5
- Products
 - adding to price lists, 2-133
 - assigning categories, 2-131
 - assigning organizations, 2-132
 - bundling, 2-136
 - creating, 2-126
 - creating and managing, 2-125 to 2-140
 - creating competitor products, 2-138
 - creating product templates, 2-139
 - creating relationships, 2-134
 - creating revisions, 2-135
 - entering competitor product details, 2-139
 - inventory attribute templates, 2-23
 - modifying detail attributes, 2-129
 - modifying inventory options, 2-130
 - modifying product templates, 2-140
 - overview, 2-22
 - removing from bundles, 2-137
 - specifying products for a bundle, 2-136
 - understanding, 2-22
 - updating for fixed budgets, 2-149
 - viewing details, 2-128
- Programs
 - creating, 2-175
 - creating and managing, 2-175 to 2-178
 - program costs and revenue metrics
 - detaching, 2-220
 - viewing associated, 2-216
 - viewing charts, 2-218
 - viewing history, 2-218
 - program metrics
 - detaching, 2-216
 - viewing associated, 2-213
 - viewing charts, 2-214
 - viewing history, 2-215
 - removing messages from, 2-178
 - selecting components, 2-177

- selecting messages for, 2-177
- viewing, 2-176

Q

Qualifiers

- setting up, 5-68

- Quick find, A-3

R

- Registration for events, 2-19

Reports

- descriptions, B-25 to B-66
- viewing claim reports, 5-156

- Request Approval button, 2-42

- Return materials authorization (RMAs), 5-44

- Rule-based postings, 3-6

- creating, 3-29
- defining rules, 3-30
- entering details, 3-29
- entering rule conditions, 3-31
- entering strategy details, 3-31
- updating, 3-33

S

- Saved searches, A-3

Schedules

- overview, 2-20
- understanding, 2-20

- Scoring runs, 4-13

- copying, 4-48
- creating, 4-35
- generating a list from, 4-15
- generating lists, 4-47
- modifying, 4-43
- scheduling, 4-42
- searching for, 4-49
- status descriptions, 4-45
- viewing logs, 4-50
- viewing results, 4-44

Scripting

- see* Oracle Scripting integration

Search

- personalized, A-3

- saved, A-3

- Search functionality, A-3

Security

- budget, 2-38

Segments

- attributes, 2-14
- creating, 2-82
- creating and managing, 2-82 to 2-84
- hierarchies, 2-13
- overview, 2-13
- understanding, 2-13
- viewing and editing, 2-83
- viewing hierarchies, 2-83
- vs. Lists, 2-15

Services

- bundling, 2-136
- modifying inventory options, 2-130

Sessions

- creating for an event agenda, 2-119

- Side navigation links, A-2

SQL

- creating custom queries for lists, 2-66

- Stylesheets, 3-5

- Suppression lists, 2-8

- associating with marketing objects, 2-68

T

Target groups

- creating for a campaign schedule, 2-96
- modifying for campaign schedules, 2-98
- understanding, 2-21

Tasks

- creating for claims, 5-127
- understanding, 2-58
- updating and removing for claims, 5-129
- viewing for claims, 5-130

Teams

- understanding, 2-58

Templates

- creating product templates, 2-139
- inventory attribute, 2-23
- metrics, 2-54
- modifying product templates, 2-140

- Thresholds
 - adding budget thresholds, 2-159
- Tracks
 - creating for an event agenda, 2-119
- Trade Management
 - budgets
 - accrual management, 5-24
 - administration, 5-38
 - allocation, 5-21
 - buckets, 5-36
 - copying, 5-40
 - creating allocations, 5-93
 - creating fully accrued, 5-98
 - deleting, 5-40
 - fixed, 5-14
 - fully accrued, 5-16
 - integration with Oracle General Ledger, 5-28
 - market eligibility, 5-18
 - off-invoice offer types, 5-24
 - overview, 5-13
 - performing adjustments, 5-103
 - product eligibility, 5-20
 - recalculated committed, 5-30
 - reconciliation, 5-33
 - requests, 5-23
 - status descriptions, 5-38
 - thresholds, 5-39
 - top-down, bottom-up, 5-22
 - tracking, 5-35
 - transfers, 5-23
 - updating during top-down, bottom up process, 5-100
 - updating market eligibility for fully accrued, 5-99
 - updating products for fully accrued, 5-100
 - user statuses, 5-39
 - viewing budget paid, 5-105
 - viewing campaign and offer summary checkbooks, 5-106
 - viewing Oracle General Ledger postings, 5-101
 - viewing recalculated committed, 5-102
 - claims
 - access levels, 5-116
 - actions, 5-45
 - adding attachments, 5-133
 - adding members to a team, 5-116
 - assignment and security, 5-46
 - associated earnings, 5-50
 - associating earnings with claim lines, 5-124
 - autopay, 5-46
 - clearing duplicate, 5-62
 - creating, 5-107
 - creating a deduction (non-transaction related), 5-112
 - creating a deduction (transaction related), 5-110
 - creating an overpayment, 5-114
 - creating claim lines, 5-120
 - creating notes, 5-135
 - creating tasks, 5-127
 - customer 360 view, 5-49
 - debit claims, 5-43
 - deductions, 5-43
 - details page, 5-49
 - editing attachments, 5-134
 - entering details for claim lines, 5-122
 - maintenance, 5-54
 - mass create, 5-46
 - mass creating, 5-109
 - notes and attachments, 5-54
 - overpayments, 5-44
 - overview, 5-40
 - ownership, 5-47
 - reassigning owners with auto assign, 5-115
 - related documents, 5-54
 - reporting, 5-58
 - research, 5-48
 - settlement, 5-54
 - settling for related customer accounts, 5-140
 - settling promotional claims for buying groups, 5-141
 - settling with a contra charge, 5-149
 - settling with an on account credit memo, 5-142
 - settling with checks, 5-152
 - splitting, 5-52, 5-131
 - statuses and status transitions, 5-60
 - tasks, 5-53
 - types, 5-42

- types and reasons, 5-45
- understanding claim creation, 5-41
- updating and removing tasks, 5-129
- updating details, 5-117
- viewing and editing notes, 5-136
- viewing history, 5-139
- viewing history details, 5-157
- viewing history line details, 5-158
- viewing history lines, 5-158
- viewing history tasks, 5-159
- viewing related documents, 5-137
- viewing reports, 5-156
- viewing settlement history, 5-160
- viewing source, 5-138
- viewing tasks, 5-130
- viewing the 360 customer view, 5-125
- viewing the claims aging view, 5-156
- concepts, 5-2 to 5-62
- debit claims
 - settling with debit memos, 5-153
- deductions
 - chargebacks, 5-44
 - contra charges, 5-44
 - invoice credit memos, 5-44
 - on account credit memos, 5-44
 - previous on account credit memos, 5-44
 - RMAs, 5-44
 - settling with a chargeback, 5-146
 - settling with a previous credit memo, 5-143
 - settling with a write off, 5-147
 - settling with invoice credit, 5-144
 - settling with invoice tax only credit, 5-145
 - settling with RMAs, 5-148
 - statuses and status transitions, 5-60
 - write offs, 5-44
- forecasts
 - creating, 5-87
 - creating new versions, 5-91
 - editing, 5-91
 - viewing the manufacturer's ROI, 5-91
- new features and enhancements, 1-11
- offers
 - account generator, 5-11
 - adjustments, 5-85
 - advanced options, 5-82

- backdating offer utilization
 - adjustments, 5-12
- budget-offer validation, 5-8
- copying, 5-86
- creating, 5-63
- entering discount rule details, 5-74
- forecasting, 5-9
- manufacturer's ROI calculator, 5-9
- offer types, 5-6
- overview, 5-5
- performance requirements, 5-79
- requesting funding, 5-81
- retail execution tracking and
 - monitoring, 5-11
- searching and viewing, 5-84
- security, 5-12
- setting up market eligibility, 5-77
- setting up qualifiers and discount rules, 5-68
- sourcing, 5-8
- status descriptions, 5-10
- overpayments
 - settling with a previous debit memo, 5-154
 - settling with a receipt write off, 5-150
 - settling with an on account cash
 - application, 5-155
 - settling with debit memos, 5-151, 5-153
- overview, 5-2
- user procedures, 5-63 to 5-160
- working with Oracle Discoverer, 5-126

Triggers

- associating to a campaign schedule, 2-190
- creating campaign triggers, 2-184
- creating metric to metric triggers, 2-189
- creating metric to value triggers, 2-186
- creating metric to workbook triggers, 2-187
- removing campaign triggers, 2-186
- understanding, 2-20
- viewing campaign triggers, 2-185
- working with, 2-184 to 2-191

U

- Universal postings, 3-6
 - creating, 3-25
 - entering details, 3-25

- entering strategy details, 3-26
 - selecting display priority, 3-27
 - updating, 3-28
- Usability
 - new features and enhancements, 1-6
- User interface
 - understanding, A-2
- User profiles
 - understanding, 2-57

V

- Venue rates
 - viewing and modifying, 2-125
- Venue rooms
 - viewing and modifying, 2-124
- Venues, 2-18
 - creating, 2-123
 - creating and managing, 2-123 to 2-125
 - viewing and editing details, 2-124
 - viewing and modifying venue rates, 2-125
 - viewing and modifying venue rooms, 2-124

W

- Web advertisements
 - creating, 3-19
- Web images, 3-4
- Web offers, 3-4
 - creating, 3-21
- Web placements
 - associating with postings, 3-37
 - creating for Oracle iStore, 3-35
 - creating for sites other than Oracle iStore, 3-36
 - Oracle iStore placements, 3-16
 - other placements, 3-18
 - partner portal placements, 3-17
 - understanding, 3-15
- Web postings
 - understanding, 3-6
- Web text, 3-4
- Write offs
 - description, 5-44
 - settling deductions with, 5-147

