

## **Oracle® Marketing**

Implementation and Administration Guide

Release 11*i*

**Part No. B13545-01**

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# Send Us Your Comments

## **Oracle Marketing Implementation and Administration Guide, Release 11i**

### **Part No. B13545-01**

Oracle 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.

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# Preface

Welcome to the *Oracle Marketing Implementation and Administration Guide*, Release 11i.

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 Applications training classes available through Oracle University.

- Oracle Self-Service Web Applications

To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- 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 guide contains the information you need to implement and administer Oracle Marketing.

- [Chapter 1](#) provides an overview of the application benefits, functional areas, and enhancements for this release.

- [Chapter 2](#) describes Oracle E-Business Suite dependencies and integration points.
- [Chapter 3](#) describes the implementation and administration of common components.
- [Chapter 4](#) describes the implementation and administration of campaign functionality.
- [Chapter 5](#) describes the implementation and administration of Campaign Workbench functionality.
- [Chapter 6](#) describes the implementation and administration of audience functionality.
- [Chapter 7](#) describes the implementation and administration of events functionality.
- [Chapter 8](#) describes the implementation and administration of marketing metrics functionality.
- [Chapter 9](#) describes the implementation and administration of data mining functionality.
- [Chapter 10](#) describes the implementation and administration of products, price lists, and deliverables functionality.
- [Chapter 11](#) describes the implementation and administration of marketing intelligence functionality.
- [Appendix A](#) describes and lists Oracle Marketing profile options.
- [Appendix B](#) describes and lists Oracle Marketing lookups.
- [Appendix C](#) describes and lists Oracle Marketing concurrent programs.
- [Appendix D](#) describes and lists Oracle Marketing list import fields.
- [Appendix E](#) describes and lists Oracle Marketing seeded user statuses.
- [Appendix F](#) describes seeded data sources and attributes.

## Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains

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## **Other Information Sources**

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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).

- **PDF Documentation**- See the Online Documentation CD for current PDF documentation for your product with each release. This Documentation CD is also available on *OracleMetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle Applications Help for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **Release Content Document** - See the Release Content Document for descriptions of new features available by release. The Release Content Document is available on *OracleMetaLink*.

- **About document** - Refer to the About document for information about your release, including feature updates, installation information, and new documentation or documentation patches that you can download. The About document is available on *OracleMetaLink*.

## Related Guides

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

You can read the guides 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>.

### Guides 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). 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.

### Guides Related to This Product

#### Oracle Marketing User Guide

This document describes concepts and procedures that business users need to use Oracle Marketing to complete day-to-day tasks.

### Installation and System Administration Guides

#### Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide



also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

### **Installing Oracle Applications**

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle 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 guides and implementation guides.

### **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.

### **“About” Document**

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on Oracle*MetaLink* for most products starting with Release 11.5.8.

### **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 and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms 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**

#### **Oracle Applications Product Update Notes**

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11i. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

#### **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 Workflow API Reference**

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

### **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 guide 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 *OracleMetaLink*.

### **Oracle Applications Message Manual**

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

## **Training and Support**

### **Training**

Oracle offers a complete set of training courses to help you and your staff master Oracle Applications and reach full productivity quickly. Many of these courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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 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 Oracle server, and your hardware and software environment.

## 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 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.

## **Your Feedback**

Thank you for using Oracle Marketing and this Implementation and Administration Guide.

Oracle values your comments and feedback. In this guide is a reader's comment form that you can use to explain what you like or dislike about Oracle Marketing or this guide. Mail your comments to the following address or call us directly at (650) 506-7000.

Oracle Applications Documentation Manager  
Oracle Corporation  
500 Oracle Parkway  
Redwood Shores, CA 94065  
U.S.A.

Or, send electronic mail to [appsdoc\\_us@oracle.com](mailto:appsdoc_us@oracle.com).



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# Product Overview

This topic group provides an overview of the Oracle Marketing application for release 11.5.10.

Topics include:

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

## 1.1 Key Benefits

Oracle Marketing provides the tools necessary to automate the planning, budgeting, execution, and tracking of your marketing initiatives. By automating these processes your marketing strategy is cost effective and intelligent.

Oracle Marketing enables you to accomplish the following:

- **Create and manage demand**
  - Establish and maintain product, service, and brand awareness
  - Track and analyze leads and sales activities
  - Route leads to the “best” channel
- **Improve customer profitability**
  - Understand customer behavior
  - Decrease customer acquisition cost
  - Reduce customer attrition
- **Automate marketing processes**
  - Create and maintain best practices templates
  - Expedite time to market
- **Keep marketing aligned with the overall organization**
  - Align leads, sales, marketing efforts and objectives
  - Distribute marketing information and collateral company wide
  - Provide the marketing team with relevant visibility into other parts of the organization
- **Measure marketing performance**
  - Track spending
  - Provide performance measurements for leads, responses, and revenue
- **Understand the competitive landscape**
  - Provide insight into competitor differentiation
  - Enable price point competition insight



## 1.2 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.

### **Core Marketing**

Oracle Marketing's "core" functionality includes Programs, Campaigns, Budgets, Events, Metrics and Analysis, Products, Deliverables, Price Lists, eMerchandising (Web marketing), Data Mining, and User Management.

For more information about core Oracle Marketing functionality, see the *Oracle Marketing User Guide*.

### **Campaign Workbench**

The Campaign Workbench provides a streamlined user interface that enables you to create and execute campaign schedules through various marketing channels (email, direct mail, fax, telemarketing, advertising and Web). This UI is separate from the Campaign tab. Schedules, however, can be executed in both places.

For more information about using Campaign Workbench, see the *Oracle Marketing User Guide*.

### **Audience Workbench**

The Audience Workbench provides you with an intuitive interface to create and manage lists. This workbench displays customer information that is relevant, logical and easy for you to use.

For more information about using Audience Workbench see the *Oracle Marketing User Guide*.

### **Marketing Intelligence**

The Marketing Intelligence component within Oracle Marketing provides comprehensive reports for the purpose of:

- Planning
- Performance monitoring
- 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**

The eMerchandising component enables the Web marketing channel within core marketing. Web content, such as Web advertisements, Web offers, and product recommendations can be created and then displayed on Oracle iStore or any other Web store.

Oracle Personalization (OP) can be integrated with eMerchandising to enable enhanced product recommendation. With OP, product recommendations are based on who the customer is, what the purchase history is, and the product that the customer is currently considering. Oracle Personalization is an automated recommendation engine that takes all relevant data into account and uses a statistical model to determine appropriate recommendations.

### **Data Mining**

Data Mining provides the ability to create predictive models of customer and prospective customer behavior based on historical data. Using these models, you can predict which segments to target for future marketing campaigns. By intelligently targeting only prospective customers 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.

## 1.3 New in this Release

This section describes new functionality developed for Oracle Marketing in the Oracle E-Business Suite 11.5.10 release.

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

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See the following sections for detailed descriptions of new functionality:

- [Section 1.3.1, "Campaign Workbench"](#)
- [Section 1.3.2, "Integration with Oracle Personalization"](#)
- [Section 1.3.3, "Tracking and Reporting on Personalization"](#)
- [Section 1.3.4, "Integration with Oracle Content Manager"](#)
- [Section 1.3.5, "Enhanced Team Access"](#)
- [Section 1.3.6, "Fatigue Rules"](#)
- [Section 1.3.7, "Audience Workbench"](#)
- [Section 1.3.8, "Data Mining Enhancements"](#)
- [Section 1.3.9, "Metrics Enhancements"](#)
- [Section 1.3.10, "Additional Miscellaneous Enhancements"](#)

### 1.3.1 Campaign Workbench

The Campaign Workbench gives you the ability to create and execute marketing initiatives quickly and easily. The Campaign Workbench is a new user interface for campaign execution. Using the Campaign Workbench, schedules are easier to create and more functional than ever.

- **Schedule Dashboard:** Enables you to monitor different metrics and view the historical trend of different metrics.
- **Schedule Gantt Chart:** Enables you to visualize the layout of promotional activities across time. Also allows you to enter single dimensions for the Gantt,

including purpose, audience, product, and channel information. This assists with planning and identifying conflicts or overlap in propositions.

- **Sales Schedules:** Allows sales and marketing users to create activities that cross sell and up sell customers in sales territories. When a sales initiative is launched, leads are generated for sales follow up.
- **Web Marketing Schedule:** Provides a simplified version of creating Web postings for placing Web ads on iStore. Instead of using eMerchandising (11.5.9), in 11.5.10 you can simply create a Web schedule using the Campaign Workbench.
- **Email Schedule:** Provides email schedules that leverage Oracle Content Management for email template purposes. Using the Campaign Workbench email schedules functionality, your email schedules (because of the template functionality) have consistent formatting, are easier to access, and are centrally located.
- **Direct Mail Schedule:** Using the direct mail channel you can print PDF documents.
- **Schedule Operational Reports:** For supported channels (Web, direct marketing, sales), workbench schedules support schedule-level reports for execution tracking.
- **Repeating Schedules:** Repeating schedules in 11.5.9 required a trigger to be setup and linked to a schedule. In 11.5.10 the process of repeating a schedule is simplified.
- **Streamlined Lead Maturation:** Campaign schedules can be easily set up to mature low value, low grade, and unaccepted leads from one or more campaigns via the new target audience natural language query builder.

### 1.3.2 Integration with Oracle Personalization

Oracle Marketing can be integrated with Oracle Personalization (OP) through Web schedules. This integration enables enhanced product recommendations for Web advertisements. Oracle Personalization can also be integrated with the eMerchandising component (which is part of core marketing).

With OP, product recommendations are based on who the customer is, what the purchase history is, and the product that the customer is currently considering. Oracle Personalization is an automated, real-time recommendation engine that takes all relevant data into account and uses a statistical model to determine appropriate recommendations.

Note: This integration has the following dependencies:

- **9.02iAS is properly setup:** Because this is not part of the official Oracle Applications tech stack, an additional step of installing the required components is required.
- **Web content is stored in Oracle Content Manager:** This setup enables content to be associated directly to products and/or product families. In 11.5.9, all Web ad content was pulled either from a schedule or from Oracle iStore. However when using OP, recommended products could have no schedule, therefore requiring the content to come from a more generic source.

### 1.3.3 Tracking and Reporting on Personalization

Oracle Marketing has had a rule-based personalization engine since release 11.5.5. With release 11.5.10, Oracle Marketing can generate reports of both the recommendations and results (for example, responses, leads, revenue).

### 1.3.4 Integration with Oracle Content Manager

The Oracle Marketing and Oracle Content Manager (OCM) integration provides the following functionality:

- **Collateral:** A midtab exposed in the UI providing for fulfillment purposes.
- **Collaboration:** A midtab exposed in the UI provides collaboration with internal sales team.

Using the enhanced collateral component available in the this release, you can:

- Create templates for emails and fax (referred to as content types).
- Create mandatory attributes for the templates. This enables all users to have the same look and feel for emails and faxes. For example, all emails can contain the company logo and copyright text.
- Create query templates at the content type level. This enables the implementation manager to create appropriate templates with queries for users to choose - therefore, a marketer doesn't have to manually enter query information.
- OCM folder security and approvals

### 1.3.5 Enhanced Team Access

In prior releases, if a campaign or event was marked as *confidential*, it would become *non-confidential* upon activation. For this release, campaigns and events will not automatically become non-confidential upon activation. If a campaign or event is confidential, it is only visible to team members, the object owner, and the administrator.

### 1.3.6 Fatigue Rules

Fatigue rules provide marketers with a tool that helps to prevent over contacting a customer regardless of the promotion or segmentation strategy.

Fatigue rules provide the following business value:

- Brand Awareness: If you can time promotions so that you don't overexpose a customer, then when you do contact them, they are more receptive.
- Marketing Strategy Decisions Support: Helps enforce marketing rules that dictate how often it is appropriate to contact a customer.
- Maximized Marketing Dollar Effectiveness: If you carefully contact your customer base, then every dollar spent will (in theory) get a better response rate.
- Improve Enterprise Collaboration: Helps the entire organization coordinate touch points. For example, telesales, direct mail, and email all have the potential to 'fatigue' the consumer. By centralizing the rules for these marketing communications, you can prevent various channels from over contacting the consumer.

### 1.3.7 Audience Workbench

The Audience Workbench provides marketers with an intuitive interface to create and manage lists, analyze list effectiveness, examine list trends, and directly view or modify their most recent lists. It also provides the administrator with a logical interface for setting up data sources, list templates, and configuring the corresponding customer profile attributes that are used by marketers to create lists.

For more information about using the Audience workbench see the *Oracle Marketing User Guide*.

### 1.3.8 Data Mining Enhancements

Data Mining functionality provides marketers with an effective tool to predict and analyze customer behavior. New Data Mining features incorporated in release 11.5.10 are as follows:

- **Predictive Model Types:** Two new out-of-the-box predictive model templates are added to provide marketers with a richer set of customer behavior predictions: Product Affinity and Customer Profitability.
- **Optimal Targeting Analysis:** Oracle Marketing's predictive modeling and scoring functionality is enhanced to provide guidance on the optimal customers/prospects to target in a campaign. This analysis is based on customer propensity scores and expected costs and revenues per customer for a campaign activity. The feature enables marketer to seamlessly use the results of a Scoring Run from either a Campaign Response Model or a Product Affinity Model to determine the optimal customers to contact.
- **Zero Implementation Steps:** The objective of this functionality is to enable easy implementation of Oracle Marketing's Data Mining functionality when customer has already implemented some of the other Oracle products. Significant enhancements have been made to ensure an easy implementation of the data mining functionality.
- **Enhanced Predictive Model Results:** Users of Oracle Marketing often need to import data about model performance to an excel sheet either to perform customized analysis or import the data into some external marketing execution system. In 11.5.10, the lift chart data for model performance will be available to the user in a table format. Users can import this data to an excel sheet. Similarly, users can download the performance matrix data through a download CSV icon for additional offline analysis.

For more information on using Data Mining see the *Oracle Marketing User Guide*.

### 1.3.9 Metrics Enhancements

Metrics enable marketers to monitor and manage the performance of various marketing objects (campaigns, events, etc.) Metrics functionality has been enhanced in release 11.5.10 to include additional metrics and a new 'Formula Metrics' type. Additionally, the user interface has been made more intuitive to facilitate better usability.

For more information on using Metrics see the *Oracle Marketing User Guide*.

### **1.3.10 Additional Miscellaneous Enhancements**

Additional minor enhancements include:

- Show start and end date on campaign schedule screen
- Show event schedule times on event screen
- Added venue capacity and registration information to event venues
- Cancelled schedules are no longer considered for data validations
- Support to register B2C customers from marketing registrations screens
- Support for event invitations



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# Oracle E-Business Suite Dependencies

This topic group describes Oracle E-Business Suite dependencies, setups, and optional integrations points.

Topics include:

- [Section 2.1, "Oracle E-Business Suite Dependency Overview"](#)
- [Section 2.2, "Mandatory vs. Conditional Dependencies"](#)
- [Section 2.3, "Understanding and Setting Up Mandatory Dependencies"](#)
- [Section 2.4, "Creating the Implementation User"](#)
- [Section 2.5, "Understanding and Setting Up Conditional Dependencies"](#)

## 2.1 Oracle E-Business Suite Dependency Overview

Oracle Marketing is a component of the integrated Oracle E-Business Suite. Because of this, you will need to verify that Oracle E-Business Suite dependencies are installed and set up properly for Oracle Marketing. The verification and setup of Oracle E-Business Suite prerequisites is necessary to ensure that supporting functionality and applications infrastructure is in place prior to beginning the Oracle Marketing implementation.

In addition, you can leverage other applications and modules within the Oracle E-Business Suite to provide additional functionality to your Oracle Marketing implementation. For example, if your business requirements mandate that your marketing campaign results be translated into leads, then you can license and implement Oracle Leads Management along with Oracle Marketing. This combined implementation would allow you to analyze and track sales leads as a follow up to your marketing initiatives.

## 2.2 Mandatory vs. Conditional Dependencies

This implementation guide categorizes Oracle E-Business Suite dependencies as follows:

- **Mandatory Dependencies:** Oracle applications and modules that provide underlying infrastructure and support to Oracle Marketing. Implementing these dependencies is required and must be complete before beginning an Oracle Marketing implementation.

For example, the Oracle Trading Community Architecture (TCA) provides a repository for customer and partner information. All customer and partner information used by Oracle Marketing is stored in the TCA tables. Because this information is critical for Oracle Marketing, TCA is a mandatory dependency, and must be setup properly.

- **Conditional Dependencies:** Oracle applications and modules that extend or enhance Oracle Marketing functionality via integration. Implementing these dependencies is conditional based on business requirements and practices, functionality desired, and licensing.

## 2.3 Understanding and Setting Up Mandatory Dependencies

Applications and modules defined as mandatory must be setup prior to implementing Oracle Marketing. The setups, however, are generally partial and limited to basic functions that are specifically needed for Oracle Marketing.

For example, Oracle Inventory is a mandatory dependency for Oracle Marketing's product functionality. However, to enable products for marketing purposes, you do not need a full Oracle Inventory implementation.

See the following sections for more information on setting up mandatory dependencies:

- [Section 2.3.1, "Setting Up Oracle CRM Application Foundation"](#)
- [Section 2.3.2, "Setting Up Oracle Territory Manager"](#)
- [Section 2.3.3, "Setting Up Oracle One-to-One Fulfillment"](#)
- [Section 2.3.4, "Setting Up Oracle Applications Object Library"](#)
- [Section 2.3.5, "Setting Up Oracle General Ledger"](#)
- [Section 2.3.6, "Defining the Marketing Calendar"](#)
- [Section 2.3.7, "Setting Up Oracle Human Resources"](#)
- [Section 2.3.8, "Setting Up Oracle Inventory"](#)
- [Section 2.3.9, "Setting Up Product Lifecycle Management"](#)
- [Section 2.3.10, "Setting Up Oracle Receivables"](#)

### 2.3.1 Setting Up Oracle CRM Application Foundation

Oracle CRM Application Foundation provides a common infrastructure upon which all Oracle CRM applications are built. By providing a set of application components, CRM Application Foundation ensures that all applications interact with key business objects in a consistent manner.

See the following sections for more information on CRM Application Foundation:

- [Section 2.3.1.1, "Resource Manager"](#)
- [Section 2.3.1.2, "Task Manager"](#)
- [Section 2.3.1.3, "Interaction History"](#)
- [Section 2.3.1.4, "Notes and Note Types"](#)

- [Section 2.3.1.5, "Assignment Manager"](#)

### **2.3.1.1 Resource Manager**

Resource Manager is mandatory for an Oracle Marketing implementation. This component enables you to use application resources regardless of where they are created. Acting as a central repository, Resource Manager enables the creation of various types of resources, groups, teams, and roles.

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

Resource Manager enables:

- Groups
- Roles
- Role Types
- Employee Import

### **2.3.1.2 Task Manager**

Task Manager is mandatory for an Oracle Marketing implementation. It provides a mechanism for your application to respond to customer needs in a timely manner. Using Task Manager you can create, assign, manage, sort, and prioritize tasks.

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

- **Task Manager: Default Task Status**

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

### **2.3.1.3 Interaction History**

Interaction History is mandatory for an Oracle Marketing implementation. It provides a common framework for capturing and accessing all interaction data associated with customer contact. Acting as a central repository, it provides a consistent API for tracking all customer interactions within the Oracle E-Business Suite.

For example, if using the tracking mechanism within Web marketing, each response (each time a customer responds to a Web ad) is tracked in Interaction History.

#### 2.3.1.4 Notes and Note Types

A complete notes implementation is optional. This module is used to create, maintain, and share notes related to customers, opportunities, service requests, and other business objects.

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

To create customized note types, use the following procedure:

#### Prerequisites

None

#### Steps

1. Log in to Oracle Forms with CRM Administrator responsibility.
2. Navigate to Notes Setup > Note Type Setup.  
The Application Object Library: Note Types Lookups form opens.
3. Define the new Lookup code.
4. Define the meaning.  
Carefully describe the Note Type meaning. It is this description that will later be used to map the Note Type to the marketing object.
5. Add a short description.
6. In the tag column enter Note.
7. Save your work.
8. To associate the Note Type with specific marketing objects, use the following procedure:
  - a. Navigate to Notes Setups > Source and Note Type Mappings.
  - b. Using the Source Object LOV, select the appropriate marketing object that will use this Note Type. For example, Campaign Schedule.
  - c. Using the Note Type LOV, select the new Note Type created. The Note Type LOV will display the text entered as the Note Type meaning.
  - d. Select an End Date for the Note Type Mapping.
  - e. Using the Application LOV, select Oracle Marketing.

- f. Save your work.
- g. Repeat for additional marketing objects.

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

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### 2.3.1.5 Assignment Manager

Implementing Assignment Manager is optional. The Assignment engine determines the best resource to be assigned to tasks based on availability and skill set. This engine is used by the various CRM modules to automatically assign tasks to a resource or a group of people.

For more information on CRM Application Foundation components, see the *Oracle CRM Application Foundation Implementation Guide*.

## 2.3.2 Setting Up Oracle Territory Manager

Implementing Oracle Territory Manager is optional. It provides an infrastructure to define territories based on flexible criteria, such as geography, zip code, area code. This engine creates automatic assignment of transactions across the entire CRM suite. For example, leads and opportunities are routed through this engine to the appropriate sales professionals.

See Oracle Territory Manager documentation for more information.

## 2.3.3 Setting Up Oracle One-to-One Fulfillment

If using email, fax, print schedules, email notifications (or if using the features of email notifications on fulfillment rules) Oracle One-to-One Fulfillment is a mandatory setup. The fulfillment engine supports high volume electronic fulfillment of documents.

When implementing Oracle One-to-One Fulfillment, the following conditions must be met:

- Fulfillment Server is created: A Fulfillment Server is an instance of the request processing software.
- Fulfillment Group is created: Fulfillment group is used to group agents (users) together.

- JFT Fulfillment Admin role is assigned to the Implementor: This role gives access to the Fulfillment administration console for setting up fulfillment, creating master documents and viewing request history. This role and responsibility only needs to be assigned to a Marketing user only if he/she will also be administering the Fulfillment activities (for example, setting up Fulfillment servers, agents, etc.). Typically, only a Marketing Administrator is involved in these activities.
- AMS: Enable Fulfillment is set to Yes

Consult Oracle One-to-One Fulfillment documentation for more information.

### 2.3.4 Setting Up Oracle Applications Object Library

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

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

### 2.3.5 Setting Up Oracle General Ledger

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

To implement GL for Oracle Marketing, you must setup the following:

- Accounting Calendar Types
- Accounting Calendar
- Currencies
- Currency Conversion Rates
- Currency Conversion Rate Types
- Set of Books

For specific setup information, see the *Oracle General Ledger User Guide*.

## 2.3.6 Defining the Marketing Calendar

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

To define the Marketing Calendar use the following procedure:

### Prerequisites

None

### Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Profile > System.
3. In the Application field enter Oracle Marketing.
4. In the Profile field enter AMS: Marketing Cal%.
5. At Site Level, click the LOV to view available AMS: Marketing Calendar options.
6. Select the appropriate Accounting Calendar.
7. Save your work.

For information about creating the Marketing Calendar, see [Section 3.3.12, "Setting Up the Marketing Calendar"](#).

## 2.3.7 Setting Up Oracle Human Resources

The Oracle Human Resources Management System (HRMS) stores information related to your organization. For detailed Oracle HRMS information, consult *Using Oracle HRMS - The Fundamentals*.

For an Oracle Marketing implementation, see the following sections for information on the HRMS setups that must be performed:

- [Section 2.3.7.1, "Determining the HRMS Navigation Path"](#)
- [Section 2.3.7.2, "Creating Lookup Values for Organization Type"](#)
- [Section 2.3.7.3, "Creating Locations"](#)
- [Section 2.3.7.4, "Creating Business Groups"](#)
- [Section 2.3.7.5, "Creating Organizations"](#)



- [Section 2.3.7.6, "Assigning Security Profile"](#)
- [Section 2.3.7.7, "Adding a Legal Entity, Operating Unit and HR Organization"](#)
- [Section 2.3.7.8, "Creating A Business Unit"](#)
- [Section 2.3.7.9, "Assigning Multi Org Responsibilities"](#)

### **2.3.7.1 Determining the HRMS Navigation Path**

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

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

### **2.3.7.2 Creating Lookup Values for Organization Type**

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

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

### **2.3.7.3 Creating Locations**

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

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

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

#### 2.3.7.4 Creating Business Groups

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

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

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

#### 2.3.7.5 Creating Organizations

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

#### 2.3.7.6 Assigning Security Profile

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

To assign the security profile use the following procedure:

#### Prerequisites

None

#### Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Profile > System.  
The Find System Profile Values form opens.
3. In the Application field enter Oracle Marketing.
4. In the Responsibility field search and select the responsibility for which the profile is being set.
5. In the Profile field enter HR: Security%

6. In the HR: Security Profile, at Site level, select an organization.

The organization selected is the business group that users will have access to. They will have access only to records within this business group.

7. Save your work.

Validate that the setting for HR: Business Group is the same organization as the HR: Security profile.

### **2.3.7.7 Adding a Legal Entity, Operating Unit and HR Organization**

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

#### **Prerequisites**

None

#### **Steps**

1. Log in to Oracle Forms with the appropriate HRMS Manager responsibility.  
For more information on determining this see [Section 2.3.7.1, "Determining the HRMS Navigation Path"](#).
2. Navigate to Work Structure > Organization > Description.  
The Find Organization form opens.
3. Search/and or Select your Organization.
4. Place your cursor in the Organization Classification Name field.
5. Using the LOV select GRE / Legal Entity.
6. Select the Enabled radio button.
7. Save your work and close this form (the Organization form will still be open in the background).
8. Select Others.
9. Select GRE / Legal Entity.
10. Select a Set of Books (defined above).
11. Click OK.
12. Save your work.

**13. Add an Operating Unit:**

- a. Under Organization Classifications Name, add Operating Unit.
- b. Click the ellipsis to select a classification.
- c. Select a Legal Entity.
- d. Click Others.
- e. Select Legal Entity Accounting.
- f. Select a set of books.
- g. Click OK.
- h. Enable by selecting the checkbox.
- i. Save your work.

**14. Add an HR Organization:**

- a. Under Organization classifications name, add HR Organization from the LOV.
- b. Enable by selecting the checkbox.
- c. Save your work.
- d. Click Others to enter additional information.
- e. Save your work.

**15. Close the form.**

### **2.3.7.8 Creating A Business Unit**

To create a new Business Unit use the following procedure:

1. Log in to Oracle with the appropriate HRMS Responsibility.  
For more information on the appropriate HRMS responsibility see [Section 2.3.7.1, "Determining the HRMS Navigation Path"](#).
2. Navigate to Work Structure > Organization > Description.
3. Select New.
4. Fill in Name of Business Unit.
5. Select Type (Business Unit).
6. Select a Location.

7. Select an Organization Classification.
8. Select Internal or External.
9. Save your work.

#### **2.3.7.9 Assigning Multi Org Responsibilities**

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

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

### **2.3.8 Setting Up Oracle Inventory**

Oracle Inventory serves as the repository for items that can be used in Oracle Marketing. Items stored in Oracle Inventory reside in the MTL\_SYSTEM\_ITEMS table.

Oracle Inventory requires one inventory organization to be identified. Typically this is the Master Inventory Organization. If you need to separate products (sold from each operating unit) into different inventory organizations, create a separate inventory organization for each operating unit.

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

### **2.3.9 Setting Up Product Lifecycle Management**

Oracle Marketing derives its product data using the product catalog provided by Product Lifecycle Management (PLM). PLM provides a product hierarchy located in the OLTP schemas. This hierarchy is maintained by the user in a product catalog and is expanded to a de-normalized table (designed for efficient traversal) by the Oracle Sales and Marketing applications.

For more information about implementing PLM for Marketing see [Section 10.1.1, "Implementing Oracle Product Lifecycle Management"](#).

### 2.3.10 Setting Up Oracle Receivables

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

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

## 2.4 Creating the Implementation User

Each user (or type of user) has a specific collection of responsibilities. Before assigning responsibilities to a user, the employee must be created in the HRMS. After the employee has been created, you can create the user and assign responsibilities and a default application ID.

To create marketing users, see the following sections:

- [Section 2.4.1, "Creating the Employee"](#)
- [Section 2.4.2, "Defining a User by Adding Responsibilities"](#)
- [Section 2.4.3, "Setting the Default Application and Responsibility"](#)
- [Section 2.4.4, "Importing the Employee"](#)
- [Section 2.4.5, "Granting Access to Audience and Administration Tabs"](#)
- [Section 2.4.6, "Updating Group Access"](#)

### 2.4.1 Creating the Employee

The first step in creating a user is creating the employee in HRMS.

#### Prerequisites

None

#### Steps

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

4. Enter the following information:

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

5. Save your work.

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

6. Select Assignment and enter the following:

- Organization
- Team/Group
- Location
- Supervisor

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

7. Save your work.

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

8. Select Yes to use the new location.

9. Save your work.

## 2.4.2 Defining a User by Adding Responsibilities

After creating the employee in HRMS, you can add responsibilities to it.

Based on your functional requirements, add one or more of the following responsibilities to your user.

### Prerequisites

- Employee is created

## Steps

1. Log into Forms with System Administrator responsibility.
2. Navigate to Security > User > Define.  
The Users form opens.
3. In the User Name field, enter a name.
4. In the Responsibilities block, assign the appropriate responsibilities to the Implementation User.
  - General Ledger Super User
  - HRMS Manager
  - Inventory
  - CRM Administrator
  - Oracle Marketing Administrator
  - Oracle Marketing Super User
  - Oracle Marketing User
  - Oracle Marketing Audience Workbench
  - Oracle Marketing Campaign Workbench
  - Workflow User Web Applications
  - System Administrator
  - Oracle Receivables
  - Oracle Payable
  - Advanced Pricing
  - Receivables Manager
5. Save your work.

For more information about creating Marketing users see:

- [Section 4.1.1, "Setting up Campaign Users"](#)
- [Section 6.1.1, "Setting Up Audience Users"](#)



### 2.4.3 Setting the Default Application and Responsibility

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

#### Prerequisites

None

#### Steps

1. Log in to Oracle Forms with System Administrator responsibility.
1. Navigate to Security > Profile > System.
2. In the Find System Profile Values Form, at User Level, search for the user that will be assigned to this application and responsibility.
3. In the Profile field enter JFT%DEFAULT%.
4. Select Find.
5. At user level set the JTF\_PROFILE\_DEFAULT\_APPLICATION to 690.
6. At user level set the JTF\_PROFILE\_DEFAULT\_RESPONSIBILITY TO 21706 (Oracle Marketing Super User).
7. Save your work.

### 2.4.4 Importing the Employee

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

#### Prerequisites

Employee exists

#### Steps

1. Log in to Oracle Forms with CRM Administrator responsibility.
2. Navigate to Resource Manager > Maintain Resources > Import Resources.
3. Locate the employee.
4. Enter employee's name in the name fields
5. Select Search.
6. Select Create Resource.

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

## 2.4.5 Granting Access to Audience and Administration Tabs

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

### Prerequisites

None

### Steps

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

## 2.4.6 Updating Group Access

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

## 2.5 Understanding and Setting Up Conditional Dependencies

Oracle Marketing's conditional dependencies can be categorized as follows:

- **Optional Marketing and Partnering Enhancements:** Additional modules that are implemented along with Oracle Marketing that are part of the Oracle Marketing and Partnering product family.

For example, you can purchase Oracle Trade Management (which is part of the Oracle Marketing and Partnering family of applications) to implement along with Oracle Marketing. This is an optional component that enables advanced budgeting, claims, claims settlement, and trade planning.

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

For example, Oracle iStore can be implemented along with Oracle Marketing. Used in conjunction with Oracle Marketing, iStore provides a Web storefront for online Web advertisement and execution. This functionality is optional, is not required for Oracle Marketing to function properly, and is therefore considered an optional integration.

### 2.5.1 Optional Marketing and Partnering Enhancements

When implementing basic Oracle Marketing, you can optionally implement additional Marketing and Partnering applications.

The following can be implemented with Oracle Marketing:

- [Section 2.5.1.1, "Oracle Trade Management"](#)
- [Section 2.5.1.2, "Oracle Partner Management"](#)
- [Section 2.5.1.3, "Oracle Leads Management"](#)
- [Section 2.5.1.4, "Oracle Content Manager"](#)

#### 2.5.1.1 Oracle Trade Management

Designed for the consumer goods sector, Oracle Trade Management provides additional B2B functionality used to:

- Control costs related to promotions
- Track deals made with retailers, distributors or partners
- Process claims and deductions

- Automate and track funds management and promotional spending

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**Note:** Oracle Trade Management must be purchased separately.

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For Oracle Trade Management implementation details, see the *Oracle Trade Management Implementation Guide*.

### 2.5.1.2 Oracle Partner Management

Oracle Partner Management assists an organization in maintaining, tracking, managing, and communicating with its partners. When implemented with the rest of the Oracle E-Business Suite, you can manage leads, track and sharing opportunities with partners, forecast sales, manage partner and customer information, send outbound information, and calendar activities, tasks and notes.

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**Note:** Oracle Partner Management must be purchased separately.

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For Oracle Partner Management implementation details, see the *Oracle Partner Management Implementation Guide*.

### 2.5.1.3 Oracle Leads Management

Oracle Leads Management enables you to automate and optimize prospect-to-sales conversion across the enterprise. Leads Management provides a staging area for all prospect leads for data quality processing, prioritization and distribution, enterprise review, and conversion. When implemented in conjunctions with the rest of the Oracle E-Business Suite, Oracle Leads Management enables you to effectively convert prospects into sales by tracking lead activity, aging, and closure.

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**Note:** Oracle Leads Management must be purchased separately.

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For more information see the *Oracle Leads Management Implementation and Administration Guide*.

### 2.5.1.4 Oracle Content Manager

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

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

OCM has a central repository that manages folders, versions, and translations, and enables an organization to work on content with associated workflows.

For more information about using OCM in the Campaign Workbench, see [Section 5.2.4, "Administrating Content in the Campaign Workbench"](#).

## 2.5.2 Optional Integrations

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

- [Section 2.5.2.1, "Integrating Oracle Data Mining and Oracle Marketing"](#)
- [Section 2.5.2.2, "Integrating Oracle Marketing and Oracle Sales Online"](#)
- [Section 2.5.2.3, "Integrating Oracle Marketing and Oracle Telesales"](#)
- [Section 2.5.2.4, "Integrating Oracle Marketing and Oracle Interaction Center \(Scripting\)"](#)
- [Section 2.5.2.5, "Integrating Oracle Marketing and Oracle iStore"](#)
- [Section 2.5.2.6, "Integrating Oracle Marketing and Oracle Discoverer"](#)
- [Section 2.5.2.7, "Integrating Oracle Personalization and Oracle Marketing"](#)

### 2.5.2.1 Integrating Oracle Data Mining and Oracle Marketing

Data Mining is an analytic feature providing a complete enterprise view of the Oracle Marketing business flows. Using extensive analytical and reporting

capabilities, all personnel within and organization can monitor the status of marketing activities in real time. Data Mining functionality is included in an Oracle Marketing license. However, the decision to implement fully is optional.

### **2.5.2.2 Integrating Oracle Marketing and Oracle Sales Online**

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

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

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

When integrated, you can also create Sales campaigns as a Sales tool to quickly create and execute cross sell/up sell campaigns that target existing customers.

For more information about implementing and using Oracle Sales Online, see *Oracle Sales Online* documentation.

### **2.5.2.3 Integrating Oracle Marketing and Oracle Telesales**

Oracle Telesales (OTS) is an application designed for inside sales professionals, inbound telesales agents, or outbound telemarketing agents. OTS offers a multi-channel selling solution that manages leads, opportunities and forecasts across all sales channels: over the phone, the Web or through mobile devices. It provides a set of tools to help the inside sales team manage the sales cycle from prospecting for customers to booking the order.

When integrating Oracle Marketing and Oracle Telesales, marketers can use the Oracle Marketing List Import feature to assign lists to TeleSales Agents. A TeleSales agent can then use the Universal Work Queue to access the list of customers assigned to them by the marketing team. For implementation details see [Section 6.2.8, "Implementing List Import for Universal Work Queue"](#).

#### **2.5.2.4 Integrating Oracle Marketing and Oracle Interaction Center (Scripting)**

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

- Advanced Inbound
- Advanced Outbound
- email Center
- Interaction Center Intelligence
- Scripting
- Universal Work Queue

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

#### **2.5.2.5 Integrating Oracle Marketing and Oracle iStore**

When Oracle Marketing and Oracle iStore are integrated, you can use the eMerchandising module of Oracle Marketing to personalize Web advertisements for Oracle iStore. Using this functionality, a marketer can make recommendations for customers. Store personalization and customer-specific recommendations are accomplished through specialty store Web postings from eMerchandising and store Event capture.

#### **2.5.2.6 Integrating Oracle Marketing and Oracle Discoverer**

Oracle Discoverer is a business intelligence/analytics application that is often implemented with Oracle Marketing for list management purposes.

When implemented, a Discoverer end user layer (containing Oracle Marketing business areas) can be launched from within the Oracle Marketing application. Using this interface, a list manager can create and manage workbooks and worksheets needed for list management purposes.

You can create a list of person and organizational contacts -- and the organization information can be part of the attribute in organization contact list. When creating a

list from Discoverer, you will need to select a mandatory identifier, which is a constant key. The other fields including "include organization", "include email", etc. are optional depending on what kind of list you want to generate.

To implement Oracle Discoverer for Oracle Marketing purposes, use the procedures below. After performing these procedure, Oracle Discoverer launches with a single sign-on from within Oracle Marketing.

- [Section 2.5.2.6.1, "Setting Discoverer Profile Options"](#)
- [Section 2.5.2.6.2, "Creating and Verifying Discoverer List Lookups"](#)
- [Section 2.5.2.6.3, "Creating the Discoverer End User Layer"](#)
- [Section 2.5.2.6.4, "Importing Discoverer EUL"](#)
- [Section 2.5.2.6.5, "Running Concurrent Programs for Lists"](#)

**2.5.2.6.1 Setting Discoverer Profile Options** Set the following profile options.

**Table 2–1 Discoverer Profile Options**

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



**Table 2–1 Discoverer Profile Options (Cont.)**

| Option                           | Required | Level | Setting      | Effect/Limitation  |
|----------------------------------|----------|-------|--------------|--|
| AMS: List Workbook B2B Marketing | Optional | Site  | User Defined | Workbook name convention prefix for B2B workbooks. The default is B2B. A blank convention prefix will result in more workbooks than you need in the LOV. |

**2.5.2.6.2 Creating and Verifying Discoverer List Lookups** This procedure will populate the LOV for the List functionality.

**Table 2–2 Lookups for Lists**

| Key                         | Type   | Seeded Values  | Meanings   |
|-----------------------------|--------|--|--|
| AMS_LIST_ ACT_TYPE          | User   | Employee List<br>List  | Target group list selection type.  |
| AMS_LIST_ DEDUP_ TYPE       | User   | List<br>Import Consumers<br>Import Organizations                 | Type of Deduplication Rules to be applied.   |
| AMS_LIST_ GENERATION_ TYPE  | System | Incremental<br><br>Standard<br><br>Update<br><br>Update No Purge | New entries added, old entries not deleted, entries not updated.<br><br>All old entries deleted, new entries added.<br><br>New entries added, old entries not meeting criteria deleted, entry information updated.<br><br>New entries added, old entries retained, entry information updated |
| AMS_LIST_ ROW_ SELECT_ TYPE | System | Nth Record<br>Random<br>Standard                                 | How to select rows during list generation. Standard is top down selection.   |
| AMS_LIST_ SEGMENT_ STATUS   | User   | Archived<br>Available<br>Cancelled<br>Draft<br>Expired           | Archived<br>Available<br>Cancelled<br>Draft<br>Expired   |

**Table 2–2 Lookups for Lists (Cont.)**

| Key                       | Type   | Seeded Values  | Meanings  |
|---------------------------|--------|--|---|
| AMS_LIST_SEGMENT_TYPE     | System | Workbook<br>SQL  | Two types of segments supported. Based on a Discoverer workbook or an SQL statement.  |
| AMS_LIST_SELECTION_ACTION | System | Include<br>Exclude<br>Intersect  | How each selection is added to the list. Exclude means that all entries that exist in the excluded list are removed from the current list. Intersect causes the current list to become a list of only those entries which are on the intersected list and the current list. |
| AMS_LIST_SELECTION_TYPE   | System | Segment<br>Workbook<br>Import List<br>List<br>SQL  | Segment<br>Workbook<br>Import List<br>List<br>SQL   |
| AMS_LIST_STATUS           | System | Archived<br>Available<br>Cancelled<br>Draft<br>Executed<br>Executing<br>Generating<br>Locked<br>New<br>Pending<br>Reserved<br>Scheduled<br>Validated<br>Validating | Archived<br>Available<br>Cancelled<br>Draft<br>Executed<br>Executing<br>Generating<br>Locked<br>New<br>Pending<br>Reserved<br>Scheduled<br>Validated<br>Validating  |
| AMS_LIST_TYPE             | System | Manual List<br>Standard List<br>Suppression List<br>Target Group   | List of possible list types. Note where these appear in the program.  |

**2.5.2.6.3 Creating the Discoverer End User Layer** Use the procedures below to create a database user and give the appropriate Applications (APPS) grants to that user. After performing this procedure, the End User Layer (EUL) for Discoverer is set for all APPS.

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

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

### Prerequisites

- Oracle Discoverer is installed
- Oracle Marketing is installed

### Steps

1. Open a DOS prompt.
2. Navigate to the directory where Oracle Discoverer Admin edition is installed. For example, if Oracle Discoverer Admin is installed in D:\orant\discvr4, type:
  - a) d:
  - b) cd \orant\discvr4
3. If the database schema has not previously been created, run the following:

```
dis4adm.exe
```

```
/CREATE_EUL
```

```
/APPS_MODE
```

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

```
/USER eul4_us
```

```
/PASSWORD eul
```

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

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

```
/SET_EUL_LANGUAGE US
```

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

```
/SHOW PROGRESS
```

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

```
dis4adm.exe
```

```
/CREATE_EUL
```

```
/APPS_MODE
```

```
/CONNECT eul_us/eul_us/eul@tst115rw (The "eul_us" should be the  
name of the database schema previously created.)
```

```
/APPS_GRANT_DETAILS apps/apps (username and password)
```

```
/SHOW_PROGRESS
```

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

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

To import the Discoverer EUL follow the procedure below:

### Prerequisites

- MKS Toolkit is implemented

### Steps

1. Start the Korn Shell (MKS Toolkit).
2. From the NT box where Discoverer Admin is installed map the \$AU\_TOP/discover directory or copy the eex files to the NT box and specify this directory as 'topdir' directory when running the utility.
3. APPS User/Responsibility must be specified for import. The imported workbooks will be saved under the specified APPS User.

4. On the new EUL make sure the APPS User does have full access privileges to use Discoverer Admin Edition.
5. Use the parameter file so that you don't have to specify all values on the command line.

```
sh adupdeul.sh
    connect=<username/password{@<two_task>}
    resp=<APPS responsibility name>
    gwyuid=<APPS GWYUID>
    fndnam=<APPS FNDNAM>
    secgroup=<APPS responsibilty security group>
    topdir=<top level directory where discoverer
        files are available>
    eulprefix=<EUL prefix (for ex EUL4 for EUL4_US)>
    language=<NLS language code>
    eultype=<OLTP|EDW>                default OLTP
{   parfile=<name of parameter file>   }
{   mode=<COMPLETE or DRIVER> default DRIVER }
{   driver=<list of driver files to be loaded
        separated by a ", " (comma)> }
{   exedir=<directory where discoverer executables are
        located> }
{   logfile=<log file name, default adupdeul.log> }
```

### Example

1. Copy the directory \$AU\_TOP/discover/US to C:\bblock\import\au\_top\discover\US.
2. With Admin Edition connect as EUL owner EUL4\_US/EUL@mydb and grant privileges for Admin Edition to apps user SYSTEST.
3. In Korn Shell CD C:\bblock\import.
4. Specify parameter values in a parameter file, for example:

```
parfile.lst
eulprefix=EUL4
exedir=D/orant/discvr4
mode=COMPLETE
topdir=C/bblock/import/au_top/discover
eultype=OLTP
fndnam=APPS
gwyuid=APPLSYSPUB/PUB
resp="Business Views Setup"
secgroup="Standard"
```

5. Start the full import, all eex files in the topdir.

```
sh adupdeul.sh
connect      = systest/welcome98@mydb
parfile      = parfile.lst
language     = US
logfile      = imp_010314_EUL4_US_mydb.log
```

Or start the import for just the files of specified ARU copy file drivers.

```
sh adupdeul.sh
connect      = systest/welcome98@mydb
parfile      = parfile.lst
language     = US
mode         = DRIVER
driver       = c1641981.drv
logfile      = imp_010314_EUL4_US_mydb.log
```

6. For the first time to import, we suggest you to use mode=COMPLETE.
7. Set the following ICX profiles in Oracle Applications at the responsibility level:

- **ICX\_PROFILE ICX\_DISCOVERER\_LAUNCHER**

URL that points to the Web Discoverer Server

Example

[http://machinename.domain/diswb4/html/discolaunch.htm?Connect=\[APP\\_SECURE\]](http://machinename.domain/diswb4/html/discolaunch.htm?Connect=[APP_SECURE])

- **ICX\_PROFILE ICX\_DISCOVERER\_VIEWER\_LAUNCHER**

URL that points to the Discoverer Viewer

Example

[http://machinename.domain/discoverer4i/viewer?cs=\[APP\\_SECURE\]](http://machinename.domain/discoverer4i/viewer?cs=[APP_SECURE])

- **ICX\_PROFILE ICX\_DEFAULT\_EUL**

This in combination with the language code make up the EUL owner at runtime. Example EUL4 (not EUL4\_US)

**2.5.2.6.5 Running Concurrent Programs for Lists** Run the following Concurrent Programs for Lists:

**Table 2–3 Concurrent Programs for Lists**

| Concurrent Manager                  | Required | Description   |
|-------------------------------------|----------|---|
| AMS : Refresh Party Market Segments | Optional | Generates a list of parties in the segment. This program also updates the size information for all segments so a history of segment sizes may be maintained.  |
| AMS : Generate Suppression list     | Optional | Updates and maintains organization defined suppression lists. This is in addition to seeded suppression lists.  |
| AMS : Purge Target Group            | Optional | After a target group has been generated and used, this program lets a user purge the list entries.  |
| AMS : Purge Imported List           | Optional | <p>During the import process, the user may specify an expiration date or number of uses for a list. This program removes those entries whose expiration date has passed or number of uses reached.</p> <p>Optional Parameter: force_purge_flag. This parameter indicates whether to purge a record regardless of the associated campaign status. The default value is No.</p> |
| Workflow Background Process         | Required | <p>The System Administrator must run this program. It populates List generation and target Group Generation data.</p> <p>Parameters:</p> <p>Item Type: AMS List Generation Process</p> <p>Deferred:</p> <p>Yes Process Timeout : yes</p> <p>Process Stuck: yes</p> <p>Ignore Minimum and Maximum Thresholds</p>   |

### 2.5.2.7 Integrating Oracle Personalization and Oracle Marketing

Implementing Oracle Personalization (OP) is an optional Oracle Marketing enhancement used for Web product recommendations (referred to as Web dynamic recommendation.) OP is an automated recommendation engine that takes in customer data and returns an intelligent product recommendation. Using OP, you can maximize transactions through intelligent product cross-selling and up-selling.

OP makes product recommendations based on:

- Customer
- Customer purchase history
- Product customer is currently viewing

OP is particularly relevant for companies that:

- Have a large customer base
- Have a large number of products (or SKUs)
- Have an online store that tracks customer browsing and purchase information

For more information about implementing Oracle Personalization see the OracleMetaLink release note *Integrating Oracle Application Server Personalization with Oracle Marketing*.



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# Implementing and Administrating Oracle Marketing Common Components

This topic group describes implementation and administration procedures for common components within Oracle Marketing.

Topics include:

- [Section 3.1, "Common Component Overview"](#)
- [Section 3.2, "Implementing Common Components"](#)
- [Section 3.3, "Administrating Common Components"](#)

## 3.1 Common Component Overview

As the Oracle Marketing implementor and/or administrator, you are responsible for setting up and maintaining the common components within the application. Common component is defined as a feature or functional behavior that applies to the entire application.

## 3.2 Implementing Common Components

The following common component setups must be completed:

- [Section 3.2.1, "Setting Common Component Profiles"](#)
- [Section 3.2.2, "Running Concurrent Programs for Common Components"](#)
- [Section 3.2.3, "Implementing Marketing Users"](#)
- [Section 3.2.4, "Implementing Fulfillment for Oracle Marketing"](#)

### 3.2.1 Setting Common Component Profiles

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

**Table 3–1   System Profiles for Common Components**

| Option                       | Required | Level | Setting  | Effect/Limitation   |
|------------------------------|----------|-------|--|---|
| AMS :<br>System<br>Timezone  | Yes      | Site  | Select the<br>timezone the<br>central server<br>is in.           | This profile specifies the default<br>timezone for the implementation.<br>Timezones are defined in HZ_<br>TIMEZONES.  |
| AMS :<br>Admin<br>Group      | Yes      | Site  | Select from<br>any group<br>defined in JTF<br>Resource<br>Groups | Resources that are part of this group<br>will have full access to all<br>Campaigns, Events, and other<br>marketing objects. Note that this<br>should be a single level group. |
| AMS :<br>Default<br>Currency | Yes      | Site  | Select from<br>currencies<br>defined in<br>FND_<br>CURRENCIES    | This becomes the default functional<br>currency. All transactions will be<br>converted and stored in this<br>currency. This will be the default<br>currency for Currency LOV. |

**Table 3–1 System Profiles for Common Components (Cont.)**

| Option                            | Required | Level  | Setting  | Effect/Limitation   |
|-----------------------------------|----------|--|--|---|
| AMS : Currency Conversion Type    | Yes      | Site<br>The User level should not be selected. | Corporate, Spot or other conversion type defined in GL | If the functional currency of the organization and the transactional currency of the marketing object are different, this conversion will be used.                                  |
| AMS : Source Code Date Format     | Yes      | Site   | Any valid date format                                  | Used in the generation of source codes.   |
| AMS : Source Code Sequence Length | Yes      | Site   | Maximum field length is 30.                            | Source Code includes Geography code, Month code, Activity code, Source code digits and Suffix. See Source Codes.  |
| AMS : UOM Area                    | Yes      | Site   | Depends on UOM Setup                                   | Displays fields that use UOM (for example, area in square feet).  |
| AMS : UOM Length                  | Yes      | Site   | Depends on UOM Setup                                   | Displays fields that use UOM (for example, length in feet).   |
| AMS : UOM Quantity                | Yes      | Site   | Depends on UOM Setup                                   | Displays fields that use UOM (for example, units in each).  |
| AMS : UOM Time                    | Yes      | Site   | Depends on UOM Setup                                   | Displays fields that use UOM (for example, time in minutes).  |
| AMS : Profile Search Set Size     | Yes      | User   | Numeric  | Indicates the number of rows displayed in selection windows.  |
| AMS : Upgrade Complete            | Optional | Site   | Yes/No   | Set this profile to No if the upgrade has run once already.   |
| AMS : Validation                  | Optional | User   | 0-100  | This profile option affects the validation severity at the database level. A value of 100 (Maximum value of 100) would cause the APIs to validate the passed data very stringently. |

**Table 3–1 System Profiles for Common Components (Cont.)**

| Option                             | Required | Level               | Setting                            | Effect/Limitation   |
|------------------------------------|----------|---------------------|------------------------------------|---|
| OSO : Minimum search string length | Optional | Site or User        | User Defined                       | The default setting is 0. This profile determines the number of characters that must be entered before performing a search.   |
| OSO : Search Lead Wildcard         | Optional | Any                 | Yes/No                             | If set to Yes, the wildcard (%) will be allowed as the first character in a search string. If set to No, and the wildcard is entered as the first character, the system will give the user an error message.  |
| AMS : Grace Period in Days         | Yes      | User                | User/Org determined number of days | <p>When automatic reconciliation of Budgets is performed, this grace period is checked. If the marketing object is older than the ending date plus the grace period, any remaining funds associated with the marketing object are returned to the Budgets they were drawn from.</p> <p>This also sets the number of days after the completion of a campaign for the concurrent manager to delete the target group entries from the AMS_LIST_ENTRIES table default is 30 days.</p> |
| JTF : Home Page File Name          | Optional | Site or Application | User Defined.                      | Enter a file name of the jsp file (for example, jtfhomepage.jsp). If no value is supplied, a generic information page is displayed. If a file is supplied, it will be displayed on the homepage.  |

### 3.2.2 Running Concurrent Programs for Common Components

Run the following concurrent programs when implementing core components for Oracle Marketing.

**Table 3–2 Concurrent Programs for Common Components**

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

### 3.2.3 Implementing Marketing Users

Oracle Marketing does not ship with seeded users. It does, however, ship with seeded responsibilities. Based on your business requirements, you will create users (that contain a collection of responsibilities) to perform certain functions within the application.

The following table lists several different examples of users (and their associated collection of responsibilities) that are relevant for an implementation. User creation is highly configurable; you can create any user types necessary.

**Table 3–3 Oracle Marketing Suggested Users**

| User Type            | Responsibilities              | Marketing Functionality   |
|----------------------|-------------------------------|---|
| Marketing Super User | Oracle Marketing Super User   | <p>This user has the ability to create campaigns, events, and programs. With access to all basic tabs, this user can perform most marketing activities, planning, and budgeting.</p> <p>Because this user does not have the Audience Workbench User Responsibility or the Campaign Workbench User Responsibility, the Audience Workbench and Campaign Workbench are not visible to this user.</p> <p>In addition to having access to all basic tabs, this user also has the ability to administrate marketing activities. This user will create Rules for approvals but will not have approval functionality.</p> |
| List Manager         | Audience Workbench Super User | This user administrates data sources and configures corresponding customer profile attributes that are used by marketers to create lists.   |
| List User            | Audience Workbench User       | Uses the Audience Workbench to create and manage lists.   |

**Table 3–3 Oracle Marketing Suggested Users (Cont.)**

| User Type               | Responsibilities  | Marketing Functionality  |
|-------------------------|---|--|
| Campaign Manager        | Campaign Workbench Super User   | This user performs administrative and setup activities to support the schedule creation, maintenance and follow up processes. They create and maintain Schedule Templates that are used by the end user to create Campaign Schedules. Super User functions also include creation and maintenance of Web Placements to be used for Web Schedules. |
| Marketing Administrator | Oracle Marketing Administrator<br>Campaign Workbench Super User<br>Audience Workbench Super User<br>Oracle Marketing Super User<br>Oracle Marketing System Administrator<br>Oracle Fulfillment Super User<br>Oracle Advanced Outbound Administrator | This user is the overall marketing administrator.<br><br>This user creates metrics and metric templates, activity templates, custom setups, marketing mediums, fulfillment, locking, fatigue, and mandatory rules, user statuses, data sources, targets, etc.  |

**Table 3–3 Oracle Marketing Suggested Users (Cont.)**

| User Type                 | Responsibilities               | Marketing Functionality   |
|---------------------------|--------------------------------|---|
| Implementation Super User | System Administrator           | This user is the overall implementation user that has the ability to perform all setup, implementation, and administrative tasks.     |
|                           | Campaign Workbench Super User  |   |
|                           | Audience Workbench Super User  | This user has all administrative and implementation privileges including: user creation, profile settings, application defaults, etc. |
|                           | Oracle Marketing Super User    |   |
|                           | System Administrator           |   |
|                           | CRM Administrator              |   |
|                           | Inventory Administrator        |   |
|                           | Oracle Content Manager         |   |
|                           | General Ledger Super User      |   |
|                           | HRMS Manager                   |   |
|                           | Workflow User Web Applications |   |
|                           | Oracle Receivables             |   |
|                           | Oracle Payable                 |   |
|                           | Advanced Pricing               |   |
|                           | Receivables Manager            |   |
|                           | 1-1 fulfillment Administrator. |   |

3.2.4 Implementing Fulfillment for Oracle Marketing

Oracle Marketing uses the following fulfillment channels for schedule execution:

- Email: Distributes email blast campaigns to a list of customers and/or prospects.
- Fax: Distributes fax blast campaigns to a list of customers and/or prospects.
- Print: Provides print fulfillment capabilities for direct marketing campaigns.

For events, email is the only fulfillment channel. This is established using fulfillment rules. For more information, see [Section 3.2.4.13, "Setting Up Fulfillment Rules for Events"](#).



The following sections describe setups for fulfillment in Oracle Marketing.

- [Section 3.2.4.1, "Setting Up Oracle Content Manager for Fulfillment Purposes"](#)
- [Section 3.2.4.2, "Assigning JTF Fulfillment Admin Role to Users and Groups"](#)
- [Section 3.2.4.3, "Setting Fulfillment Profiles"](#)
- [Section 3.2.4.4, "Setting Up Collateral Content"](#)
- [Section 3.2.4.5, "Understanding Fulfillment Queries for Cover Letters"](#)
- [Section 3.2.4.6, "Seeded Campaign and Event Fulfillment Queries"](#)
- [Section 3.2.4.7, "Associating Seeded Fulfillment Queries with Templates"](#)
- [Section 3.2.4.8, "Creating a Custom Fulfillment Query"](#)
- [Section 3.2.4.9, "Creating Content Types for Cover Letters"](#)
- [Section 3.2.4.10, "Creating a New Cover Letter"](#)
- [Section 3.2.4.11, "Creating a Click-Through Destination for a Cover Letter"](#)
- [Section 3.2.4.12, "Adding Images to a Template"](#)
- [Section 3.2.4.13, "Setting Up Fulfillment Rules for Events"](#)

### **3.2.4.1 Setting Up Oracle Content Manager for Fulfillment Purposes**

Oracle Content Manager (OCM) is the content repository for Oracle Marketing. You must have the appropriate permissions granted to your user in order to create content items in OCM folders. For more information, see the *Oracle Content Manager Implementation Guide*.

To implement OCM for Marketing use the following guidelines:

- Create OCM Directories. See the *Oracle Content Manager Implementation Guide* for specific procedures.
- Grant Directory Privileged to Users and Groups. See the *Oracle Content Manager Implementation Guide* for specific procedures.
- Setup Approvals. See the *Oracle Content Manager Implementation Guide* for specific procedures.

### 3.2.4.2 Assigning JTF Fulfillment Admin Role to Users and Groups

Assign the **JTF Fulfillment Admin** role to Fulfillment users and administrators. This role gives access to the Fulfillment administration console for setting up fulfillment, creating master documents and viewing request history.

This role only needs to be assigned to Marketing users if they will also be administering Fulfillment activities (for example, setting up Fulfillment servers, agents, etc.). Typically, only a Marketing Administrator is involved in these activities. Additionally, if setting up Oracle One-to-One Fulfillment for Events and Campaigns, the user must have this role.

Use the following procedure to assign this role to a user:

#### Prerequisites

None

#### Steps

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

If the user is to have access to the Audience and/or Administration tabs, add a role type of Sales and a Role of Sales Representative. For Oracle One-to-One Fulfillment:

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

### 3.2.4.3 Setting Fulfillment Profiles

To enable Oracle One-to-One Fulfillment, set **AMS: Enable Fulfillment** to **Yes** at site level. Without setting this profile, fulfillment activities will not execute for Campaigns or Events.

### 3.2.4.4 Setting Up Collateral Content

Marketing campaigns and events often require that some sort of collateral content is sent to potential customers and event attendees. Collateral content is defined in Oracle Marketing as any electronic marketing material fulfilled to customers through an automated process. This type of content is always outbound and typically requires a cover letter.

Collateral content consists of:

- **Content Types:** Provides a framework or structure for the cover letter. This content type can be re-used for various types of cover letters.
- **Cover Letters:** Represents the actual content for the outbound activity. Contains various content blocks (defined by the content type). Also contains a body (defined by the query).
- **Queries:** SQL statements that collect data from the database - the retrieved data is merged into the cover letter using personalization tags (which are defined by the query).

Marketers can only view cover letters that they have access to. Therefore, they must be given appropriate cover letter folder privileges. Folder privileges are handled through Oracle Content Manager's folder security.

### 3.2.4.5 Understanding Fulfillment Queries for Cover Letters

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

A query serves two purposes.

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

### 3.2.4.6 Seeded Campaign and Event Fulfillment Queries

For Campaigns and Events, Oracle Marketing ships with seeded queries that contain the related mail merge tags.

The following fulfillment queries for seeded for Campaigns:

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

The following fulfillment queries are seeded for Events:

- Invitation
- Registration
- Venue Change
- Date Change
- Cancelled

If Oracle Marketing's seeded fulfillment queries do not meet your business requirements, then you can create custom queries. For more information see [Section 3.2.4.8, "Creating a Custom Fulfillment Query"](#).

### 3.2.4.7 Associating Seeded Fulfillment Queries with Templates

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

#### Prerequisites

None

### Steps

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

#### 3.2.4.8 Creating a Custom Fulfillment Query

To create a custom query, follow the procedure below:

### Prerequisites

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

### Steps

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

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

- Marketing Simple Query bind variables: :schedule\_id
- Marketing Detailed Query bind variables: :schedule\_id

7. Select **Apply** to save your changes.

The Query is not active until the status is Approved.

### 3.2.4.9 Creating Content Types for Cover Letters

Oracle Marketing seeds a structure for cover letters. Being the administrator, you can modify the structure by defining different attributes for it. For example, you can modify the footer, header, images for the seeded content type.

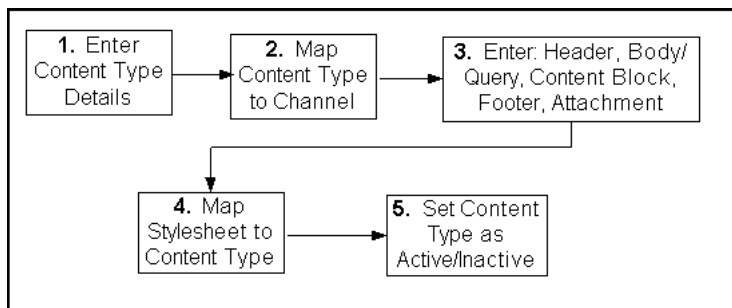
You can also map content types to specific channels. For example, you can map to email, fax, or print fulfillment channels. Based on the mapped templates, end users can search existing cover letters of the particular types you've enabled.

Content Types can be set as active or inactive. Inactive content types can't be used for content item creation.

The following content types are seeded for cover letters:

- Basic Fulfillment Cover Letter: Contains body, content block, attachments. Does not contain headers or footers.
- Fulfillment Cover Letter: Has a complete structure. Contains headers, body, content block, footers, and attachments.

**Figure 3–1 Administrating Cover Letters Content Types -- Setup Flow**



To set up content types for cover letters, use the following procedure:

## Prerequisites

Query is created

## Steps

1. Login as a user that has the Oracle Marketing Administrator responsibility.
2. Navigate to Administration > Marketing > Fulfillment > Content Type.
3. Select **Create**.
4. In the Create Content Type page, enter the following details:
  - Name: Enter a logical name for this content type. For example, if creating a content type for fax only, a logical name would be: Fax Only Standard.
  - Status: If the status is active, the content type is available for use in the cover letter. Otherwise, you will not be able to select it when creating the cover letter.
  - Content Group: Using the provided checkboxes, select the appropriate *channel* for this content type. For example, if the content type is created for Fax only, place a check in the Fax checkbox.
5. In the Header region, enter the following details:
  - Display: Using this checkbox, determine if the header is part the structure of the content type.
  - Header Block: Using the search icon, optionally select a default header block. The header block typically contains the company logo, and will be added to the main email body.
    - Updatable: If you want the ability to update this default when creating the actual cover letter, select Yes in this drop-down. Otherwise, select No.
    - Required: If you want the header block to be a required field when creating the cover letter, select Yes in this drop-down. Otherwise, select No.
  - Header Image: Using the search icon, optionally select a default image for the header block. If using the header block for the company logo, you will select the image content here.
    - Updatable: If you want the ability to update the image default when creating the actual cover letter, select Yes in this drop-down. Otherwise, select No.

- Required: If you want the header block image to be a required field when creating the cover letter, select Yes in this drop-down. Otherwise, select No.
- 6. In the Body region, you will select a query to be used for mail merge fields in the body of the cover letter:
  - Query: Required field for an active content type. Can create content types without Query when the status is inactive. Using the search icon, select the appropriate query tag for this content item. For example, if this content item is for marketing emails, then you might select Marketing Simple Query.
- 7. In the Content Blocks section, enter the following content block details:
  - Display: Using this checkbox, determine if the content block is part the structure of the content type.
  - Content Block: Using the search icon, select the appropriate content block for this content type. Content blocks can be created in OCM or the Deliverables component within Oracle Marketing.
    - Updatable: If you want the ability to update this default when creating the actual cover letter, select Yes in this drop-down. Otherwise, select No.
    - Required: If you want the header block to be a required field when creating the cover letter, select Yes in this drop-down. Otherwise, select No.
- 8. In the footer region, enter the following details:
  - Footer Block: Using the search icon, optionally select a default footer block. This can be any static non-personalizable content.
    - Display: Using this checkbox, you will determine if the footer block will be part the structure of the content type.
    - Updatable: If you want the ability to update this default when creating the actual cover letter, select Yes in this drop-down. Otherwise, select No.
    - Required: If you want the header block to be a required field when creating the cover letter, select Yes in this drop-down. Otherwise, select No.
  - Footer Image: Using the search icon, optionally select a default image for the footer block.



- Display: Using this checkbox, you will determine if the footer image will be part the structure of the content type.
- Updatable: If you want the ability to update the image default when creating the actual cover letter, select Yes in this drop-down. Otherwise, select No.
- Required: If you want the footer block image to be a required field when creating the cover letter, select Yes in this drop-down. Otherwise, select No.

9. In the Attachments region, enter the following details:

- Display: Using this checkbox, you will determine if attachments are part the structure of the content type.
- Attachments: Using the search icon, you are able to see all file attachment items in OCM repository. You can select any of them to be the default, if needed.
  - Updatable: If you want the ability to update the image default when creating the actual cover letter, select Yes in this drop-down. Otherwise, select No.
  - Required: If you want the footer block image to be a required field when creating the cover letter, select Yes in this drop-down. Otherwise, select No.

10. Select **Apply**.

### 3.2.4.10 Creating a New Cover Letter

Once you have a query and a cover letter content type, you are ready to build the actual cover letter. The cover letter represents the actual content, whereas the content type simply provides a structure or framework for it. At times, your end users will perform this task.

#### Prerequisites

- Query is created
- Content Type for the cover letter is created

#### Steps

1. Login as a user that has the Oracle Marketing Administrator responsibility.
2. Navigate to Administration > Marketing > Fulfillment > Cover Letter.

The Cover Letter Summary page opens. Using these pages, you can define a new cover letter or update details for an existing cover letter.

3. In the Cover Letter Summary page, fill in the following mandatory details:
  - Content Group: Select the appropriate channel for this cover letter. For example, if the cover letter is for fax, select fax as your channel.
  - Content Types: Select a content type for the cover letter. The content type provides a predefined structure for the cover letter.
  - Version: Select either latest version or live version. Live version is the latest approved version of the cover letter. You cannot make a non-live version (latest, for example which is not live) be available to your end users for pulling it up in schedule context.
4. Select **Go**.
5. Enter the following mandatory details (displayed components will depend on the structure of the content type selected):
  - Name: Enter a logical name for this cover letter. For example, if this cover letter is for faxes created in March, March Fax Standard Cover would be a reasonable names.
  - Location: Enter a location for the cover letter. If the default value not your desired location, you can easily change it by changing the profile IBC: Default Home Folder.  
  
For example, if the default is /COMMON you could change it to /AMS.

**Figure 3–2 Changing the Default Location for a Cover Letter**

| Profile Name                 | Default Value           | User Value |
|------------------------------|-------------------------|------------|
| IBC : Content Type Group     |                         |            |
| IBC : Display Base Lang      | Yes                     |            |
| IBC: Debug Output Directory  | /slot02/oracle/SMEU1R10 |            |
| IBC: Debug Type              | File                    |            |
| IBC: Default Home Folder     | /COMMON                 |            |
| IBC: Enable Audit Log        |                         |            |
| IBC: Enable Debug            |                         |            |
| IBC: Enable Encryption       | No                      |            |
| IBC: Enforce Available Date  | Yes                     |            |
| IBC: Enforce Expiration Date | Yes                     |            |
| IBC: Use Access Control      | No                      |            |
|                              |                         |            |

- Header: If a header is required for this cover letter, search and select a content item and image for the header.
- Body: Using the HTML text box, enter the appropriate content using any personalization tags provided in the shuttle box by the query.  
If using Internet Explorer, the text box appears in HTML. If using Netscape, it appears as a plain text box.
- Content Blocks: Select the appropriate content block for this cover letter.
- Footer: If a footer is required for this cover letter, search and select a content item and image for the footer.
- Attachments: If sending an attachment with this cover letter search and select it here. For example, if this cover letter uses a cover title, add it as an attachment.
- Upload Attachments: To upload a new attachment, select Browse, locate the new attachment, and select Add Attachment.
- Content Rendition: This field is required when using the print channel. Using the search icon, upload a PDF file for this email content. The PDF will be stored as a rendition which can later be used in a Print Schedule. This file will not be sent as part of your email. You can embed the mail merge tags used by the query above into the PDF document.

6. Select Submit for Approval.

Depending on the defined approval process, the cover letter is sent for approval.

#### **3.2.4.11 Creating a Click-Through Destination for a Cover Letter**

When using the email channel, it is likely that the cover letter will include a click-through destination.

If creating your cover letters in Oracle One-to-One Fulfillment (not Oracle Marketing) your click-through actions are pulled from OCM. In this case, your actions are limited to:

- Go to URL
- Go to Content Item

Because of this, it is recommended that you create your cover letters using Oracle Marketing.

#### **3.2.4.12 Adding Images to a Template**

Images can be added to templates. If an image has been added, when the template is displayed, an image appears within the template body. Images are added using the iFrame content creation box. Consequently, you must use a browser, such as Internet Explorer, that supports this technology.

To add images to a template use the following procedure:

#### **Prerequisites**

- Profile option JFT\_FM\_BASE\_IMAGE URL is set to the same server value as your applications
- Template is created

#### **Steps**

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Fulfillment > Template.
3. Open the template.

The Template Schedule details page opens.

4. In the iFrame text box, select the camera icon.

If using a Netscape browser, the iFrame textbox is not available and therefore images can't be added.

5. Select the image upload location:

- File: Select if uploading the image from a local file folder. Use the browse button to search for the image.
- URL: Select is uploading the image from a URL. Indicate the full path name of the image.

For example, if using the Australian flag image found on the Oracle Store landing page, you will need to "View HTML source" on the page, and include the image source path: /OA\_MEDIA/jtfaust.gif.

6. Select Preview to preview changes.
7. Select Apply to save your work.

### 3.2.4.13 Setting Up Fulfillment Rules for Events

When creating templates for Events, you must set up fulfillment rules. These rules are created to link objects and actions to cover letters. When creating fulfillment rules, it is important to note that Event letters can only use events tokens. Specifically, the **event\_reg\_id** token must exist in the query.

For Events, the following actions are seeded:

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

To implement fulfillment rules, follow this procedure:

#### Prerequisites

Template has been created

### Steps

1. Navigate to Administration > Marketing > Setup > Fulfillment Rules.
2. In the Object Column LOV, choose Event Schedule.
3. In the Action Column LOV, choose an Action. The available Actions (seeded) for Event Schedules are:
  - Event Cancellation
  - Event Date/Time Change
  - Registration Cancellation
  - Registration Confirmation
  - Venue Change
  - Wait List ConfirmationCustom Actions are not currently supported.
4. Enter a Subject.
5. Click the icon next to the Cover Letter and select a Cover Letter from the available cover letters created in Oracle Fulfillment.
6. Click Update.
7. To preview the template, click the icon in the Preview column.

## 3.3 Administering Common Components

The following administrative components are common the entire application and should be setup or verified before setting up related specific components.

- [Section 3.3.1, "Creating Custom Setups"](#)
- [Section 3.3.2, "Setting Up Categories"](#)
- [Section 3.3.3, "Setting Up Activities"](#)
- [Section 3.3.4, "Setting Up User Statuses"](#)
- [Section 3.3.5, "Setting Up Mandatory Rules"](#)
- [Section 3.3.6, "Setting Up Locking Rules"](#)
- [Section 3.3.7, "Setting Up Approval Rules"](#)
- [Section 3.3.8, "Setting Up Geographic Areas"](#)

- [Section 3.3.10, "Setting Up Word Replacement Rules"](#)
- [Section 3.3.9, "Setting Up Existence Checking"](#)
- [Section 3.3.11, "Setting Up Marketing Source Codes"](#)
- [Section 3.3.12, "Setting Up the Marketing Calendar"](#)

### 3.3.1 Creating Custom Setups

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

For example, if a company decides to perform direct marketing campaigns that always use e-mail as the delivery mechanism, a custom setup for the marketing object "Campaign Schedule" can be created. This custom setup would have the following attributes:

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

You can create custom setups for the following marketing objects:

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

Custom setup types affect all objects of that type within the application. The setup is restricted to newly created objects of that type.

For example, if a Deliverable is associated with a Campaign but the Deliverable side navigation menu item is disabled on the custom setup, the Deliverable item for currently existing objects will not be visible to users. If the Deliverable item is enabled again, then the associated Deliverable will become available.

To implement and understand Custom Setups see the following sections:

- [Section 3.3.1.1, "Custom Setup Functionality Overview"](#)
- [Section 3.3.1.2, "Creating a Custom Setup"](#)
- [Section 3.3.1.3, "Setting Up Custom Setup Details"](#)

### **3.3.1.1 Custom Setup Functionality Overview**

Custom setups control the following:

- **Side Navigation Menu:** The vertical menu which appears on the left-hand side of the page once an object is created. The side panel menu does not appear until you create a new object.
- **Menu Items:** These are the smallest components on the Side Navigation Menu. Menu items are the functional areas within the application where data can be created or where objects are viewed. Some of the menu items have functional implications, others are used for information purposes only.
- **Component Groups:** Each of the menu items are logically grouped into various sections based on functionality. Component Groups include Planning, Execution, Tracking, Collaboration and Approval. Within each Component Group is a logical collection of menu items.
- **Seeded Menu Items:** The following is a list of objects you can create Custom Setups to be used with.
  - Main
  - Messages
  - Geography
  - Product
  - Deliverable
  - Budget
  - Team



- Contact Point
- Trigger
- Schedule
- Offer
- Tasks
- Notes
- Partners
- Cost and Revenues
- Campaign Schedule
- Metrics
- Attachments
- Theme Approval
- Budget Approval
- Market Eligibility
- Products
- Allocation
- Checkbook

### **3.3.1.2 Creating a Custom Setup**

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

To create a Custom Setup use the following procedure:

#### **Prerequisites**

None

#### **Steps**

1. Navigate to Administration > Marketing > Setup > Custom Setup.
2. Select **Create**.
3. Enter a Custom Setup name.

4. Associate the Custom Setup with a marketing object. For a list of available marketing objects see [Section 3.3.1.1, "Custom Setup Functionality Overview"](#).
5. Depending on the marketing object selected, additional fields such as Activity Type and Activity may appear. This indicates that the Custom Setup is valid for the specific combination.
  - The selection of Activity Type and Activity determines the available Component Groups and Menu Items. For example, Direct Marketing - Email has a different set of Component Groups and Menu Items as compared to Direct Marketing – Direct Mail.
  - The available combinations of Activity Type and Activity in the Create Custom Setup page depend on the definition of the organization's Activities, Activity Types and Categories. In the case of Deliverables, the combination of Activity Type and Activity is based on the parent and child category. Custom Setups for Campaign Schedules depend on the relationship of Activity Type and Activity.
6. Check Active for the Custom Setup to be available for selection during a marketing object create.
7. Optional. Check Allow Essential and Optional Grouping if this Custom Setup can be used with the Side Navigation Look profile option.
8. Optional. Enter a suffix to be used as part of the source code.

The suffix set here is reflected when an object is created. The suffix can be alpha, numeric or a combination. The maximum number of characters is 3.
9. Optional. Enter a brief description for this Custom Setup.
10. Select **Create**.

### 3.3.1.3 Setting Up Custom Setup Details

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

#### Prerequisites

None

#### Steps

1. Navigate to Administration > Marketing > Setup > Custom Setup.

2. Select the Custom Setup created previously. For more information see [Section 3.3.1.2, "Creating a Custom Setup"](#).

The Custom Setup Details page opens. The combination of Menu Items displayed is based on the marketing object, Activity, and Activity Type combination selected when creating the Custom Setup.

3. Place a check in the Active checkbox.
4. Place a check in the Allow Essential and Optional Groupings checkbox.
5. Provide a brief description (optional).
6. In the Components section, provide the following details:
  - Component Group: Displays by default based on the marketing object, Activity, and Activity type selected for Custom Setup.
  - Display Sequence: Use this column to control the order of the marketing Objects (as they appear in the side navigation menu). For example, if Products is to appear on the side navigation menu directly below Main, Product should be sequentially numbered directly after Main. Main is not an optional setting and must be included. In this example, Main could be given a value of 10, and Product could be given a value of 11.
  - Available Attributes: Use this column to indicate if the attributes for this object should be made available.
  - Essential: To control the display order of a particular marketing object, place a check in the Essential checkbox (be sure to select the Essential checkbox that aligns with the correct marketing object). Anything not checked in the "Essential" column is considered "Optional" and is listed in alphabetical order.
  - Essential Display Sequence: Display sequence is a numeric setting used to order marketing objects in side navigation menus. If the Essential checkbox is checked, numeric values need to be provided enables the "Essential" marketing objects to be ordered appropriately. The Display Sequence column is used to determine the order when "Business Process View" profile value is selected.
  - Reports: Place a check in the Reports checkbox to enable attributes to be shown in the portals.
7. Click **Update**.

## 3.3.2 Setting Up Categories

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

- Deliverables
- Events
- Metrics
- Budgets
- Approval Rules

To understand and implement Categories see the following sections:

- [Section 3.3.2.1, "Deliverable Categories"](#)
- [Section 3.3.2.2, "Events Categories"](#)
- [Section 3.3.2.3, "Metrics Categories"](#)
- [Section 3.3.2.4, "Budgets Categories"](#)
- [Section 3.3.2.5, "Approval Rules and Categories"](#)
- [Section 3.3.2.6, "Setting Up Deliverables Categories for Custom Setups"](#)

### 3.3.2.1 Deliverable Categories

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

- Collateral
- Creative
- Email

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

### **3.3.2.2 Events Categories**

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

### **3.3.2.3 Metrics Categories**

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

### **3.3.2.4 Budgets Categories**

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

### **3.3.2.5 Approval Rules and Categories**

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

### **3.3.2.6 Setting Up Deliverables Categories for Custom Setups**

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

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

- [Section 3.3.2.7, "Create Category"](#)
- [Section 3.3.2.8, "Verify Category"](#)

### **3.3.2.7 Create Category**

Use the following procedure to create a category.

#### **Prerequisites**

None

### Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Categories.
3. Select **Create**.
4. Enter a Category Name.
5. Select a Parent Category if desired.
6. Select the Enabled checkbox to make the Category available.
7. Select a marketing object from the Created For drop-down menu.
8. Enter a description.
9. In case of metrics or Deliverables make sure the parent-child relationship is captured correctly.

---

---

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

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### 3.3.2.8 Verify Category

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

#### Prerequisites

Category has been set up

### Steps

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

Verify that Category field displays values in the drop down menu.

8. Navigate to the Administration > Marketing > General > Metrics.

Verify that the Category field displays values in the drop down menu.

### 3.3.3 Setting Up Activities

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

To understand and implement Activities see the following sections:

- [Section 3.3.3.1, "Understanding Activity Types"](#)
- [Section 3.3.3.2, "Seeded Activities and Activity Types"](#)
- [Section 3.3.3.3, "Setting Up an Activity"](#)

#### 3.3.3.1 Understanding Activity Types

Available activity types are:

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

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

Activities can be created within the application and can be linked to an existing Activity Type. When an Activity Type is selected for a Object Create or Custom Setup, the Activities that has been created for the Activity Type will populate the Activity LOV.

The available Activity Types are:

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

- Web Marketing
- Events

### **3.3.3.2 Seeded Activities and Activity Types**

The following is a list of seeded activities for activity types

- Advertising:
  - Banner Ads
  - Billboard
  - Brochures/Booklets
  - Directories
  - Display Signs
  - Magazine
  - Motion Pictures
  - Netcast
  - Newspaper
  - Posters/Leaflets
  - Print Ads
  - Radio
  - TV
- Direct Marketing:
  - Catalog Direct Mail
  - Email
  - Fax
  - Magazine Insert
  - Telemarketing
- In-Store:
  - Display
  - End-Aisle



- Grounders
- Kiosk
- Menu Boards
- Package-Inserts
- Packaging-Outer
- Point-of-Purchase Displays
- Shelf
- Shop around
- Press and Analyst Relations:
  - Article
  - Briefing
  - Community Relations
  - Company Magazine
  - Crisis Communications
  - Internal Communications
  - Investor Relations
  - Lobbying
  - Press Conference
  - Publications
  - Release
  - Tour

### **3.3.3.3 Setting Up an Activity**

Use the following procedure to create an activity:

#### **Prerequisites**

None

### Steps

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

### 3.3.4 Setting Up User Statuses

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

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

The system status can be extended using user Status to enhance the analysis and reporting functionality. One such method would be to add a cancellation reason to the cancelled status.

For example:

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

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

- [Section 3.3.4.1, "Seeded User Statuses"](#)
- [Section 3.3.4.2, "Creating User Statuses"](#)

### **3.3.4.1 Seeded User Statuses**

All enabled user statuses are available in the Campaign Status LOV. Seeded user status values are marked Enabled and Default. This means that the system status value will show up for objects as the default value. System status values cannot be disabled.

New user status values can be created. Once a new user status is created for a combination of activity and status and marked enabled, the seeded system status value automatically loses its default flag. There cannot be two default user statuses for given combination of activity and status.

Refer to [Appendix E, "Seeded User Statuses"](#) for a listing of seeded user statuses for release 11.5.10.

### **3.3.4.2 Creating User Statuses**

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

Use the following procedure to create user statuses:

#### **Prerequisites**

None

#### **Steps**

1. Navigate to Administration > Marketing > Setup > User Status > Create.
2. Select a marketing object for the User Status For field.

3. Select a System Status for the marketing object.
4. Enter a User Status to replace the System Status for the marketing object.
5. Select the Enabled checkbox to make the User Status available.

In order to set this User Status as a default, the Default check box needs to be checked in the overview screen for one of the newly created User Status, if not, the seeded User Status will be reflected on the Campaign. On update, the default value on the seeded User Status is automatically removed.

6. Save your work.

### 3.3.5 Setting Up Mandatory Rules

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

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

To create mandatory rules, follow the procedure below:

#### Prerequisites

None

#### Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Mandatory Rules.
3. The Mandatory Rules Details page opens.
4. In the Parent Object Type drop-down menu select Campaign.
5. In the Object Attribute drop-down menu select Main (this is the side navigational menu for which this field appears).
6. In the Available fields column, select Purpose. Highlight this field, shuffle it to the Selected Fields column.

7. Select Update to save your work.
8. Navigate to Campaign > Campaigns > (open an existing Campaign).
9. Navigate to Campaign Details page.
10. Purpose is now a mandatory field.

### 3.3.6 Setting Up Locking Rules

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

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

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

#### **Prerequisites**

None

#### **Steps**

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

8. Navigate to Campaign > Campaigns > (open an existing Campaign).
9. Navigate to Campaign Details page.
10. The Version field is now locked.

### 3.3.7 Setting Up Approval Rules

Approvals can be used for all objects created within the Oracle Marketing application. It is possible to specify a business unit on an approval rule for a campaign schedule, however the business unit does not appear on the campaign schedule. Although not visible, the business unit is inherited from the campaign. In other words, approval rules for campaign schedules use the business unit from the campaign (if specified).

For core Marketing approval rules can be created on the following marketing objects:

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

To understand and implement Approval Rules see the following sections:

- [Section 3.3.7.1, "Overview of Approval Rules"](#)
- [Section 3.3.7.2, "Understanding the Approval Process"](#)
- [Section 3.3.7.3, "Setting Up Approvals"](#)

#### 3.3.7.1 Overview of Approval Rules

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

### **Concept Approval**

Done prior to approving any finances for the Object. The requirement of 'Concept' approval for any Object is based on the 'Custom Setup' used for creating the Object.

### **Budget Line Approval**

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

### **Budget Approval**

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

### **Budget Request Approval**

Type of approval is related to the Budget Transfers. Budget transfers are used to transfer funds between two Budgets. This approval is guided by the Budget category used while creating the Budget which the funds are being sourced from. Note: Child Budget creation is also similar to the Budget request approval.

### **Root Budget Approval**

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

#### **3.3.7.2 Understanding the Approval Process**

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

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

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

### **3.3.7.3 Setting Up Approvals**

Use the following procedure to implement approvals.

- [Section 3.3.7.4, "Setting Up Role Types for Approvals"](#)
- [Section 3.3.7.5, "Setting Up Roles for Approvers"](#)
- [Section 3.3.7.6, "Setting Profile Options for Approvals"](#)
- [Section 3.3.7.7, "Creating Approval Rules"](#)
- [Section 3.3.7.8, "Assigning Approvers"](#)
- [Section 3.3.7.9, "Running Workflow Background Process for Approvals"](#)

### **3.3.7.4 Setting Up Role Types for Approvals**

The required role types for approvals are:

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

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

#### **Prerequisites**

None

#### **Steps**

1. Log in to Oracle Forms with CRM Administrator responsibility.



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

### **3.3.7.5 Setting Up Roles for Approvers**

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

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

Use the following procedure to set up approver roles:

#### **Prerequisites**

None

#### **Steps**

1. Log in to Oracle Forms with Oracle Marketing Administrator responsibility.

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

3.3.7.6 Setting Profile Options for Approvals

See the table below for system profiles and their values.

Table 3–4 Profile Options for Approvals

| Option                              | Required | Level | Setting                         | Effect/Limitation  |
|-------------------------------------|----------|-------|---------------------------------|--|
| AMS: Cutoff Percentage for Approval | Yes      | Site  | Enter a value between 0 and 100 | <p>For a marketing object with an Initial Estimated Amount (IEA) value entered into the Budget page for that object to go to Active status, it must obtain Budget approval for this percentage of the IEA. During the initial stage, before the object status is Active, requests in excess of the IEA are not allowed.</p> <p>For example, an object with an IEA of \$1,000 and an AMS: Cutoff Percentage for Approval of 60, requires approval of \$600 in order to become Active. The same object in an organization with an AMS Threshold of 100, requires approval of \$1,000 to become Active.</p> |

**Table 3–4 Profile Options for Approvals (Cont.)**

| Option                        | Required | Level | Setting | Effect/Limitation   |
|-------------------------------|----------|-------|---------|---|
| AMS:<br>Source from<br>Parent | Yes      | Site  | Yes/No  | Determines whether Campaign Schedules and Event Schedules are sourced from their parent Campaigns and Events (select Yes) or from Budgets (select No). Campaigns and Events may only be sourced from Budgets. |

### 3.3.7.7 Creating Approval Rules

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

Use the following procedure to create approval rules:

#### Prerequisites

None

#### Steps

1. Navigate to Administration > Marketing > Setups > Approval Rules.
2. Select **Create**.
3. Enter a Name for the Approval Rule.
4. Select an Approval Rule Type from the following:
5. Object: Approval Type: Concept is for 'Concept Approval'.
  - Budget Request - Approval Type: Budget is for 'Budget Line Approval' (this is for funds requested from a Budget). This is when you request funds from a Budget. This is the rule that will apply for 'Budget Transfers' and Child Budgets. Note: Budget Requests for Transfers and Child Budgets will follow the above rule.
  - Budget Transfer: Used while transferring funds from one Budget to another.
  - Root Budget - Approval Type: Budget is for Root Budget Approval.
  - Campaign/Event - Approval Type: Budget is for Overall Object Approval (this is the third approval after the threshold is met). It is after this approval that the object's status will go Active.

3.3.7.8 Assigning Approvers

Approvers can be assigned by role, user, function or a combination of all three. The functions in use will be functions such as 'Object Owner', 'Parent Object Owner', or 'Budget Owner'.

These are similar to approval roles but are different in the sense that they are dynamic based on each 'Object' and do not have to be assigned to a 'User'.If the approval needs to be sent through a chain of approvers, The approvers need to be set in an order.

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

3.3.7.9 Running Workflow Background Process for Approvals

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

Table 3–5 Workflow Background Process for Approvals

| Concurrent Manager          | Required | Description   |
|-----------------------------|----------|---|
| Workflow Background Process | Yes      | <div>Parameters required:</div> <ul style="list-style-type: none"><li>Set Item Type: AMS Marketing Approvals</li><li>Minimum Threshold: Leave blank.</li><li>Maximum Threshold: Leave blank.</li><li>Process Deferred: Yes</li><li>Process Timeout: Yes</li></ul> <div>The concurrent process is required to process the approvals. As mentioned earlier, there are three approval processes to complete: Concept, Budget Line and Budget.</div> <div>The concurrent process is required for Concept and Budget Line approvals. Other approvals, Budget Request, Root Budget and Object approval, occur in real time.</div> |

3.3.7.10 Determining/Verifying the Default Marketing Approver

Use the following SQL statement to determine who the default marketing approver is:

```

SELECT emp.resource_name, rr.role_resource_id
FROM ams_jtf_rs_emp_v emp,
      jtf_rs_role_relations rr,
      jtf_rs_roles_vl rl
WHERE rr.role_id = rl.role_id
AND rr.role_resource_id = emp.resource_id
and rl.role_type_code in( 'MKTGAPPR','AMSAPPR')
AND rl.role_code = 'AMS_DEFAULT_APPROVER'
AND rr.ROLE_RESOURCE_TYPE = 'RS_INDIVIDUAL'
AND delete_flag = 'N'
AND sysdate between rr.start_date_active
and nvl(rr.end_date_active,sysdate);

```

### 3.3.8 Setting Up Geographic Areas

Geographies are created in two sections. First the Geographic Location Types are created and then Geographic Areas are created. Each Geographic Area has a Geographic Location Type associated with it. Run the Concurrent Manager Program, **Load Geographic Hierarchies**, any time Geography is modified.

#### Prerequisites

None

#### Steps

1. Navigate to Administration > Marketing > Geography > Location Type.
2. For each of the levels, enter a Name for the type and a Description.
  - Area 1 (top level)
  - Area 2 (second level)
  - Country
  - C Region (regions within Country)
  - State
  - S Region (regions within State)
  - City
  - Postal Code
3. Select **Update**.

4. Navigate to Administration > Marketing > Geography > Geographic Area.
5. Select a Parent Geographic Area.  
The Geographic hierarchy should be created from the top down.
6. Select a Type for the child area.  
Enter the Name, Short Name (will be used for Source Code generation), Start and End Dates (End Date is optional) for each child geographic area.
7. Select **Update**.

### 3.3.9 Setting Up Existence Checking

Existence Checking is done by using fuzzy keys and word replacement rules. List import programs use algorithms to create any TCA entity. For more information about existence checking and list import, see [Section 6.2.6.2, "Performing Existence Checking for List Import"](#).

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

- [Section 3.3.9.1, "Existence Checking Algorithm"](#)
- [Section 3.3.9.2, "Existence Checking with the Customer Key"](#)
- [Section 3.3.9.3, "Existence Checking for Address"](#)
- [Section 3.3.9.4, "Existence Checking for Contacts"](#)
- [Section 3.3.9.5, "Existence Checking for Contact Points"](#)

#### 3.3.9.1 Existence Checking Algorithm

The following describes existence checking algorithm logic:

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

#### 3.3.9.2 Existence Checking with the Customer Key

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

populates the AMS\_IMP\_SOURCE\_LINES table with dedupe keys for all records to be imported. If it finds a match on the HZ\_PARTIES, then it uses the matching customer, otherwise it creates a new customer using the TCA API. As mentioned above, if there are multiple records with the same customer key then the import record is created for the customer having highest party\_id.

Any word replacement rules are defined in TCA then those rules will be applied to the customer name in the table while populating the key in AMS\_IMP\_SOURCE\_LINES table.

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

### **3.3.9.3 Existence Checking for Address**

In the TCA customer model, the address consists of the party site in HZ\_PARTY\_SITES and location in HZ\_LOCATIONS. Locations is a physical address, such as 500 Oracle Parkway, Redwood Shores, CA 94065. The Party Site is a logical name associated with a location. For example, the Party Site - "Head Quarters" can be associated with a location 500 Oracle Parkway. Multiple party sites can point to the same location. For example, 500 Oracle Parkway can be both "Head Quarters" and "Human Resources". The List Import program check whether the location exists in HZ\_LOCATIONS or not as well as whether the party site for the combination of location and customer exists in HZ\_PARTY\_SITES.

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

If a matching record is found in HZ\_LOCATIONS then it uses the matching location otherwise it creates a new location using TCA API. As mentioned above if there are multiple records with the same address key then it takes the location having highest location\_id.

Once the location\_id is created, the program finds out whether a party site exists for the combination of this location\_id and party\_id. If such party site already exists then it takes that party\_site\_id. If not then a new party site is created using TCA API.

#### 3.3.9.4 Existence Checking for Contacts

In TCA, the contact is stored as a party of type “PERSON” in HZ\_PARTIES and a relationship is created between the customer and contact in HZ\_RELATIONSHIPS. The List Import program checks whether the contact exists in HZ\_PARTIES (as a party of type “PERSON”) as well as it checks whether a relationship of type “Contact” exists between the customer and contact in HZ\_RELATIONSHIPS. The existence checking is done using customer\_key in TCA table (HZ\_PARTIES). Refer to the above section on customer.

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

Note that if relationship of any other type exists then List import program will create a new relationship. If a contact with same first name and last name (thus same party\_name in HZ\_PARTIES) exists in table then list Import will not create a new contact in TCA tables. It will just create a new relationship if one does not exist and attach the list to that contact.

#### 3.3.9.5 Existence Checking for Contact Points

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

### 3.3.10 Setting Up Word Replacement Rules

Follow the steps below to add new words to TCA’s word replacement system. If migrating word replacement rules from a local to remote instance, after adding the rules (using the procedure below) you will need to run the concurrent program **AMS Migrate Word replacement Rules for Remote List Processing**.

#### Prerequisites

Oracle Accounts Receivable (TCA) is implemented

#### Steps

1. Log in to Oracle Forms with Trading Community Manager responsibility.
2. Navigate to Data Quality Management > Setup > Word Replacements.



3. In the Word List field, search for the appropriate list. For example, if looking to write a word replacement for Rachael, you would locate the Person Name Dictionary.
4. Add new word replacements.
5. Save your work.

### 3.3.11 Setting Up Marketing Source Codes

Source codes are unique identifiers for the following marketing objects:

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

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

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

- [Section 3.3.11.1, "Source Code Construction"](#)
- [Section 3.3.11.2, "Source Code Schema"](#)

#### 3.3.11.1 Source Code Construction

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

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

3.3.11.2 Source Code Schema

Each marketing object has a column referencing the source code. This source code is unique throughout the application. Given a source code, it can be traced back to its marketing object by looking at the AMS\_SOURCE\_CODES table.

Table 3–6 Source Code Schema Reference

| Table                     | Object ID Fields              | Source Code Fields  |
|---------------------------|-------------------------------|---|
| AMS_CAMPAIGNS_VL          | CAMPAIGN_ID                   | source_code   |
| AMS_CAMPAIGN_SCHEDULES_VL | SCHEDULE_ID                   | source_code   |
| AMS_EVENT_HEADERS_VL      | EVENT_HEADER_ID               | source_code   |
| AMS_EVENT_OFFERS_VL       | EVENT_OFFER_ID                | source_code   |
| AMS_OFFERS_VL             | OFFER_ID<br>QP_LIST_HEADER_ID | offer_code  |
| AMS_SOURCE_CODES          | SOURCE_CODE_ID                | source_code<br>arc_source_code_for<br>source_code_for_id<br>related_source_code<br>related_source_object<br>related_source_id |

The following table shows definitions for the AMS\_SOURCE\_CODE table:

Table 3–7 AMS\_SOURCE\_CODE Table Definitions

| Column Name        | Field Type   | Description  |
|--------------------|--------------|--|
| SOURCE_CODE_ID     | NUMBER       | Unique identifier for the source code table  |
| SOURCE_CODE        | VARCHAR2(30) | Unique identifier for all the marketing objects. Source codes are communicated to the customers. |
| SOURCE_CODE_FOR_ID | NUMBER       | FK to the marketing object to which the source code points to.                                   |

**Table 3–7 AMS\_SOURCE\_CODE Table Definitions (Cont.)**

| Column Name           | Field Type   | Description  |
|-----------------------|--------------|--|
| ARC_SOURCE_CODE_FOR   | VARCHAR2(30) | Four letter code that points to a marketing object (EVEH = Event headers, EVEO = Event Schedules, EONE = One-Off Events, CAMP = Campaigns, CSCH = Campaign Schedules, OFFR = Offers)         |
| ACTIVE_FLAG           | VARCHAR2(1)  | Flag to indicate if the source code is active or not.  |
| RELATED_SOURCE_CODE   | VARCHAR2(30) | Source code of the related object. This is used in case of Event promotions. The customer is interested in the related Event that the Campaign is promoting rather than the Campaign itself. |
| RELATED_SOURCE_OBJECT | VARCHAR2(30) | Four letter code that points to the related marketing object (EVEH = Event headers, EVEO = Event Schedules, CAMP = Campaigns, CSCH = Campaign Schedules, OFFR = Offers)                      |
| RELATED_SOURCE_ID     | NUMBER       | FK to the marketing object to which the related source code points to.   |

### 3.3.12 Setting Up the Marketing Calendar

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

Marketing objects supported by the Marketing Calendar:

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

To implement the Marketing Calendar use the following procedure:

- [Section 3.3.12.1, "Assigning Usage to Resource Group"](#)
- [Section 3.3.12.2, "Selecting Calendar Display Parameters"](#)
- [Section 3.3.12.3, "Running Concurrent Program for Calendar"](#)
- [Section 3.3.12.4, "Configuring User Profiles"](#)

### **3.3.12.1 Assigning Usage to Resource Group**

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

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

#### **Prerequisites**

None

#### **Steps**

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

### **3.3.12.2 Selecting Calendar Display Parameters**

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

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

To specify Calendar parameters follow the procedure below:

### Prerequisites

None

### Steps

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

#### 3.3.12.3 Running Concurrent Program for Calendar

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

#### 3.3.12.4 Configuring User Profiles

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

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

1. Log in to Oracle Marketing.
2. Select the Profile icon.
3. Navigate to Calendar > Personalize.
4. In the Display Items drop-down menu choose **Yes**. The default value for this drop-down menu is No. This profile turns on the Calendar feature.
5. Select **Update** to save your work.

---

# Implementing and Administating Campaigns

This topic group describes concepts and procedures related to Oracle Marketing campaign functionality.

Topics include:

- [Section 4.1, "Implementing Campaigns"](#)
- [Section 4.2, "Administating Campaigns"](#)

## 4.1 Implementing Campaigns

Implementing Campaigns is slightly different than administering campaigns. Implementation tasks are considered one time setups. Administrative tasks, on the other hand, are ongoing and may require updates on a frequent basis.

This section includes tasks for implementing Oracle Marketing Campaigns. Procedures listed below relate to setting up functionality existing outside the Campaign Workbench. For Campaign Workbench setup information, see [Section 5.1, "Implementing the Campaign Workbench"](#).

To implement Campaigns, see:

- [Section 4.1.1, "Setting up Campaign Users"](#)
- [Section 4.1.2, "Setting Up Campaign Fulfillment"](#)
- [Section 4.1.3, "Creating and Verifying Lookups for Campaigns"](#)
- [Section 4.1.4, "Understanding Schedule Execution"](#)
- [Section 4.1.5, "Running Concurrent Programs for Campaigns"](#)
- [Section 4.1.6, "Implementing eMerchandising for the Campaign Tab"](#)
- [Section 4.1.7, "Implementing Scripts for Campaigns"](#)

### 4.1.1 Setting up Campaign Users

In Oracle Marketing, a user's ability to perform certain functions depends on the associated responsibilities attached to the user. Depending on job function and related day-to-day tasks, assign one or both of the following responsibilities to your users:

#### **Marketing User Responsibility**

This responsibility has the following visibility and privileges:

- Ability to create campaigns, programs, budgets and budget security
- Unable to see the Campaign Workbench

#### **Marketing Super User Responsibility**

This responsibility has the following visibility and privileges:

- Accesses all Marketing UI's, including the Campaign and Audience Workbench.



- Ability to navigate from the Oracle Marketing application to the Campaign and Audience Workbench.

## 4.1.2 Setting Up Campaign Fulfillment

Refer to [Section 3.2.4, "Implementing Fulfillment for Oracle Marketing"](#) for information on setting up campaign fulfillment.

## 4.1.3 Creating and Verifying Lookups for Campaigns

As mandated by your business requirements, verify or create the following lookups.

**Table 4–1 Campaign System Lookups**

| Lookup Key                   | Value         | Meaning                 |
|------------------------------|---------------|-------------------------|
| AMS_ACCESS_TYPE              | Group         | Group                   |
| AMS_CAMPAIGN_SCHEDULE_STATUS | Active        | Active                  |
|                              | Archived      | Archived                |
|                              | Available     | Available               |
|                              | Cancelled     | Cancelled               |
|                              | Closed        | Closed                  |
|                              | Completed     | Completed               |
|                              | Denied_BA     | Denied Budget Approval  |
|                              | New           | New                     |
|                              | On_Hold       | Active, but locked      |
|                              | Submitted_ BA | Pending Budget Approval |

**Table 4–1 Campaign System Lookups (Cont.)**

| <b>Lookup Key</b>      | <b>Value</b>   | <b>Meaning</b>  |
|------------------------|--|---|
| AMS_CAMPAIGN_STATUS    | Active<br>Archived<br>Available<br>Cancelled<br>Closed<br>Completed<br>Denied_BA<br>Denied_TA<br>New<br>On_Hold<br>Planning<br>Submitted_Budget Approval<br>Submitted_Theme Approval | Active<br>Archived<br>Available<br>Cancelled<br>Closed<br>Completed<br>Denied Budget Approval<br>Denied Theme Approval<br>New<br>Active, but locked<br>Planned<br>Submitted for Budget Approval<br>Submitted for Theme Approval |
| AMS_CAMPAIGN_PURPOSE   | Awareness<br>Lead<br>Lead_Maturation<br>Sales_Readiness  | Awareness<br>Lead Generation<br>Lead Maturation<br>Sales Readiness  |
| AMS_CONTACT_POINT_TYPE | Address<br>Email<br>Fax<br>Inbound_script<br>Outbound_script<br>Phone<br>Website<br>Proposal   | Address<br>Email<br>Fax<br>Inbound Script<br>Outbound Script<br>Phone<br>Website<br>Proposal  |
| AMS_MASTER_OBJECT_TYPE | Camp<br>CSCH<br>EONE<br>EVEH   | Campaign<br>Campaign Schedule<br>One-Off Event<br>Event   |

**Table 4–1 Campaign System Lookups (Cont.)**

| Lookup Key             | Value  | Meaning  |
|------------------------|--|--|
| AMS_MEDIA_TYPE         | Broadcast<br>Deal<br>Direct_Marketing<br>Events<br>Internet<br>In_Store<br>Public_Relations<br>Trade_Promotion<br>Direct_Sales | Advertising<br>Deal<br>Direct Marketing<br>Events<br>Web Marketing<br>In Store<br>Press and Analyst Relations<br>Trade Promotions<br>Sales |
| AMS_PRIORITY           | Fast_Track<br>High<br>Standard   | Fast Track<br>High<br>Standard   |
| AMS_PROGRAM_OBJECTIVE  | User Defined   |  |
| AMS_PROGRAM_STATUS     | Active<br>Archived<br>Cancelled<br>Completed<br>New<br>On_Hold   | Active<br>Archived<br>Cancelled<br>Completed<br>New<br>Active, but locked  |
| AMS_ROLLUP_TYPE        | Coll<br>Deal<br>ECAM<br>EVCAM<br>Partner<br>RCAM<br>TRDP   | Collection<br>Deal<br>Campaign<br>Event Promotions<br>Partner<br>Program<br>Trade Promotion  |
| AMS_SCHEDULE_OBJECTIVE | User Defined   | User Defined   |

**Table 4–1 Campaign System Lookups (Cont.)**

| <b>Lookup Key</b>           | <b>Value</b>  | <b>Meaning</b>   |
|-----------------------------|---|--|
| AMS_TRIGGER_CHK_METRIC_TYPE | Actual<br>Forecast  | Actual Value<br>Forecast Value   |
| AMS_TRIGGER_CHK_TYPE        | DIWB<br>Metric<br>Static_Value                                      | Workbook<br>Metric<br>Static Value   |
| AMS_TRIGGER_FREQUENCY_TYPE  | Daily<br>Hourly<br>Monthly<br>None<br>Quarterly<br>Weekly<br>Yearly | The frequency of trigger checking  |
| AMS_TRIGGER_TYPE            | Metric_Metric<br>Metric_Value<br>Metric_Workbook                    | Metric to Metric type trigger<br>Metric to Value type trigger<br>Metric to Workbook type trigger |
| AMS_CAMP_RELATED_EVENT      | EONE<br>EVEH<br>EVEO  | One-Off Event<br>Event<br>Event Schedule   |

#### 4.1.4 Understanding Schedule Execution

The business events system automatically activates schedules on a specified start date. When the schedule is approved, the schedule execution workflow begins. This workflow has business events that can be used for further customizations.

#### 4.1.5 Running Concurrent Programs for Campaigns

Run the following concurrent programs for campaigns:

**Table 4–2 Campaign Concurrent Programs**

| Concurrent Program               | Required | Description  |
|----------------------------------|----------|--|
| AMS: Complete Campaign Schedules | Optional | <p>This program accomplishes the following:</p> <ul style="list-style-type: none"> <li>■ Picks up available schedules with a start date of today (or, a start date that has already passed) and activates them.</li> <li>■ Picks up active schedules with an end date of today (or, an end that has passed) and completes them.</li> </ul> |

### 4.1.6 Implementing eMerchandising for the Campaign Tab

eMerchandising is the Web marketing module within Oracle Marketing. When used with campaigns it enables Web marketing and personalization. eMerchandising can be implemented with Oracle iStore or any other third-party affiliate Web storefront.

Before setting up eMerchandising the following applications need to be setup (if listed as mandatory).

- Oracle Marketing: Prior to implementing eMerchandising, Oracle Marketing must be properly implemented.
- Oracle iStore: This step is mandatory only if it is integrated with Oracle iStore. See the *Oracle iStore Implementation Guide* for details.
- Oracle Partner Management: This implementation step is optional. See the *Oracle Partner Management Implementation Guide* for details.
- Oracle iSupport: Implementing Oracle iSupport is optional. When implemented, the Oracle iSupport portal displays eMerchandising content.

---

**Note:** The eMerchandising module is an optional implementation step. It can only be implemented with Oracle Marketing Campaigns and is not designed to work with the Campaign Workbench.

---

To implement eMerchandising see the following:

- [Section 4.1.6.1, "Setting Web Posting and Placement Profiles"](#)

- [Section 4.1.6.2, "Verifying and Creating Lookups"](#)
- [Section 4.1.6.3, "Running Concurrent Programs"](#)
- [Section 4.1.6.4, "Setting Up the Guest User"](#)
- [Section 4.1.6.5, "Integrating eMerchandising with Third-Party Web Storefronts"](#)

#### **4.1.6.1 Setting Web Posting and Placement Profiles**

A *Web posting* is an object used to define personalized content that is dynamically selected and displayed at run-time in a placement. Web postings allow a particular content selection strategy to be executed depending on the conditions present.

There are two types of postings:

- Universal: Applies the same merchandising strategy to all the visitors.
- Rule Based: Allows you to specify different merchandising strategies for different customers, using targeting conditions.

A *Web placement* is a logical representation for a physical space on an application page where some content (returned by a posting) is displayed. You can activate a placement once you assign to it a posting and display style.

A Web placement is identified by:

- A site
- A page
- Page parameters

To set system profiles for Web postings and Web placements, use the following procedure:

#### **Prerequisites**

- Oracle iStore and Oracle Partner Management are implemented, if required

#### **Steps**

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

The following table lists the system profiles and their values.

**Table 4–3 eMerchandising Profile Options**

| Option                                       | Required | Level     | Setting   | Effect/Limitation   |
|--|----------|-----------|---|---|
| AMS : Item Validation Organization           | Yes      | Resp Site | User Defined  | This profile is used when validating the items that are used in posting definition and runtime.<br><br>This will determine which items to be displayed when a product recommendation strategy is defined.       |
| AMS : Custom Condition Class                 | Optional | Site      | Java class name of the custom condition                                 | This class is invoked at runtime when custom conditions are implemented.  |
| AMS : OA Media                               | Optional | Site      | Physical file path of media directory where the image files are stored. | This is used in the upgrade process to read the files from the media directory and store them in the database.  |
| AMS : Posting Runtime Shopping Cart Currency | Yes      | Site      | Select from a list of values. USD is the default.                       | Determines the currency in which shopping cart amounts are measured.  |
| AMS : Upgrade iMarketing                     | Optional | Site      | Yes/No  | Used to determine whether to upgrade iMarketing data from the previous version.   |
| AMS: Merchant Party ID                       | Optional | Site      | Choose from a list of Parties provided                                  | This value determines the party ID of the current active merchant.<br><br>This sets the merchant ID for the creation of affiliate placements.<br><br>This option must be set before creating an affiliate site. |

**Table 4–3 eMerchandising Profile Options (Cont.)**

| Option                  | Required | Level | Setting      | Effect/Limitation   |
|-------------------------|----------|-------|--------------|---|
| AMS: Server URL         | Optional | Site  | User Defined | <p>This value determines the runtime URL path of the server. Used to generate API details for affiliates during placement definition.</p> <p>This must be set before creating any affiliate placement definition.</p> <p>For example:<br/>http://YourHostName:PortNum</p> |
| IBE: Use Web Placements | Optional | App   | Yes/No       | Determines whether placements are displayed. Required only when implementing iStore.  |

#### 4.1.6.2 Verifying and Creating Lookups

Use the following procedure to create and verify lookups:

##### Prerequisites

None

##### Steps

1. Log in to Oracle Forms as a user with the System Administrator responsibility.
2. Navigate to Setups > Lookups.
3. Choose View > Find to locate the individual keys.

The following table lists the Lookups and their types, values, and meanings.

**Table 4–4 Web Posting Lookups**

| Key                    | Type   | Values                        | Meanings                                   |
|------------------------|--------|-------------------------------|--|
| AMS_POST_CONTENT_TYPES | System | Product<br>Schedule<br>Offers | Product<br>Web Advertisement<br>Web Offers |



**Table 4–4 Web Posting Lookups (Cont.)**

| Key                                      | Type       | Values   | Meanings   |
|--|------------|--|--|
| AMS_POST_STRATEGY_TYPE                   | System     | Manual_Selection<br><br>Product_Relationship<br>Custom<br>OP                                       | Manually selected strategy<br><br>Strategy based on product relationship<br>Custom strategy<br>Used when Oracle Personalization is implemented -- only works with product content type |
| AMS_POST_PREDEF_PROD_CONTEXT             | System     | Prod_viewed<br>Prod_in_cart  | The product context for relationship based strategy.   |
| AMS_PRIOR_SORT_ORDER                     | System     | Asc<br>Desc  | Ascending<br>Descending  |
| AMS_POST_CATEGORY                        | System     | Universal<br>Rulebased   | Posting types: Universal or based on a rule.   |
| AMS_POST_STATUS                          | System     | Active<br>Inactive   | N/A  |
| AMS_POST_BUSPRIOR<br>(Business Priority) | System     | None<br>Random<br>Prod_list_price<br>Campaign_Start_Date<br>Campaign_End_Date<br>Campaign_Priority | None<br>Random (for all)<br>List Price (for products only)<br>Start Date, End Date, or Priority (for campaign schedules)   |
| AMS_POST_BUSPRIOR                        | User       | Offer_Start_Date<br>Offer_End_Datte  | Offer start and end dates are used by Web Offers   |
| IBE_RELATIONSHIP_TYPES                   | Extensible | Possible relationships between Products like Cross Sell, Up Sell.                                  | This is an iStore lookup type.   |

**Table 4–4 Web Posting Lookups (Cont.)**

| Key                    | Type       | Values  | Meanings  |
|------------------------|------------|---|---|
| AMS_POST_RELATIONSHIPS | System     | Promoting<br>Relationship types<br>not covered by<br><i>iStore</i>    | Promoting is a<br>relationship not covered<br>by <i>iStore</i> , as in<br>promoting a product.            |
| AMS_POST_COMP_OPERATOR | System     | EQ<br>GTE<br>LTE  | Equal to<br>Greater than or equal to<br>Less than or equal to<br>Used to compare<br>shopping cart amount. |
| AMS_POST_AUDIENCE_TYPE | System     | S<br>L  | Segment<br>List   |
| AMS_POST_CND_DATA_TYPE | System     | Float<br>String   | Data Types returnable<br>by Custom Condition<br>Class.  |
| AMS_PLCE_SITE_CATEGORY | System     | Oracle_Applications<br>Other_Applications<br>Affiliates               | Oracle Applications<br>Other Applications<br>Affiliates   |
| AMS_PLCE_LOCATION_CODE | Extensible | Left1, Left2...Left7<br>Right1, Right2 ...<br>Right7<br>Top<br>Bottom | Positions for placements  |

---

**Note:** For Web offers to be displayed in Oracle Marketing, at the application level, set **QP: Source System Code** to Oracle Marketing.

---

### 4.1.6.3 Running Concurrent Programs

Run the following concurrent programs to update eMerchandising functionality.

**Table 4–5 eMerchandising Concurrent Programs**

| <b>Concurrent Manager</b>                                | <b>Required</b> | <b>Description</b>  |
|--|-----------------|---|
| AMS Web Execution: Specialty Store Items Refresh Program | Yes             | Refreshes the denormalized table for minisites periodically to capture items in the iStore minisites.   |
| AMS Web Execution: Campaign Items Refresh Program        | Yes             | Information about Campaigns is stored in multiple tables. To improve runtime performance, this program periodically collects required information on campaigns and places it into a single table. |
| AMS Web Execution: Refresh Offer Parties and Products    | Yes             | Refreshes the Offer Denormalized tables. Marketing Online offers functionality will retrieve the Eligible Offers for any Products depending For Qualifying parties.                               |
| AMS: Refresh Party Market Segments                       | Optional        | Generates a list of parties in the segment.   |

### 4.1.6.4 Setting Up the Guest User

You must create this account before you can view your online stores. If you do not create a guest user account, marketers will be unable to view the content created for eMerchandising.

Use the following procedure to create the Oracle Marketing guest user account.

#### Prerequisites

None

#### Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Navigate to Security > User > Define.
3. In the User Name field, enter a user name, such as IBEGUEST, by which a guest user will be automatically logged in to Oracle Marketing.
4. In the Password field, enter a password for this user name.

5. In the Responsibilities block, choose an Oracle Marketing customer responsibility, such as IBE\_CUSTOMER, from the Responsibility LOV.
6. Save the user record.

#### **4.1.6.5 Integrating eMerchandising with Third-Party Web Storefronts**

Integrating eMerchandising with Third-Party Web stores enables customers to create segments in Oracle Marketing. These segments can be re-used in rule-based posting conditions to personalize Web Ads.

The Web Ads can be on sites such as the corporate Web site, or an employee portal built with Oracle Portal. This feature is also available even if the database storing the members of these sites are not in the TCA.

Web execution may be implemented by other application through jsp pages or HTML Pages.

For example, suppose a campaign schedule is to be displayed on the homepage:

- Site = MYSITE
- Page = HOME
- Location(s) = TOP\_CENTER and UPPER\_RIGHT

Consult the following sections to integrate eMerchandising with a third-party storefront:

- [Section 4.1.6.6, "Prerequisite Steps"](#)
- [Section 4.1.6.7, "Implementing Web Execution through JSP Pages"](#)
- [Section 4.1.6.8, "Implementing Web Execution through HTML Pages"](#)

#### **4.1.6.6 Prerequisite Steps**

The following steps must be performed prior to implementing a Web execution through jsp or HTML pages.

##### **Steps**

1. Define a Site in the Site definition screen (Marketing > Administration > Marketing > Execution > Sites) with a Programmatic Access Name for the site. In our example, the Programmatic Access Name for the site is 'MYSITE'.
2. Define a Page for the above defined Site in the Page definition screen (Marketing Online > Administration > Marketing > Execution > Pages) with a

Programmatic Access Name for the page. In our example, the Programmatic Access Name for the page is 'HOME'.

3. Define a Web placement location. The following locations are available:
  - TOP
  - BOTTOM
  - MIDDLE 1-4
  - LEFT 1-7
  - RIGHT 1-7
4. Define posting (Marketing Online > Execution > Web Postings).
5. Define a Placement in the Placement definition screen (Marketing Online > Execution > Web Placements).

#### 4.1.6.7 Implementing Web Execution through JSP Pages

In order to implement Web execution through java server pages, use the following steps.

---

---

**Note:** The jsp scope should always be 'REQUEST' scope, otherwise the recommendation will not be displayed.

---

---

1. Set site and page attributes
  - a. These should be set at the top of the User Application jsp.
  - b. Set 'site' and 'page' attributes of page context with the corresponding programmatic access names
  - c. In our scenario, the following would be code snippet for this step:
 

```
-----
<%
pageContext.setAttribute("site", "MYSITE", PageContext.REQUEST_SCOPE);
pageContext.setAttribute("page", "HOME", PageContext.REQUEST_SCOPE);
%>
-----
```
2. Set location and include amsWebPlacement.jsp where the recommendation is intended to be displayed. Repeat this step at every location where you want the recommendation to appear.

- a. Set Location attributes of page context.
- b. Include file `amsWebPlacement.jsp`
- c. In our scenario, following would be code snippets for this step:

```
-----
pageContext.setAttribute("location", "TOP_RIGHT", PageContext.REQUEST_
SCOPE);
<jspinclude page="amsWebPlacement.jsp" flush="true" />
-----

pageContext.setAttribute("location", "UPPER_RIGHT", PageContext.REQUEST_
SCOPE);
<jspinclude page="amsWebPlacement.jsp" flush="true" />
-----
```

---



---

**Note:** This `amsWebPlacement.jsp` will ultimately display a HTML code.

---



---

## Notes

- Above Step 1 should be done only once in a jsp.
- Above Step 2 should be repeated at every location where you intend to see a recommendation.
- Following are the seeded locations. New locations can be created in Location Lookup Types screen.
  - LEFT1, LEFT2, LEFT3, LEFT4, LEFT5, LEFT6, LEFT7
  - RIGHT1, RIGHT2, RIGHT3, RIGHT4, RIGHT5, RIGHT6, RIGHT7
  - TOP, BOTTOM

### 4.1.6.8 Implementing Web Execution through HTML Pages

Web execution can be implemented for HTML applications as well. For this method of implementation, a URL should be invoked with all required name-value parameters. This URL could be invoked through a java script from a HTML page. The invoked URL will get back the recommendations.

Follow these steps to form the URL to be invoked.

1. `http://<server name><port number>/OA_HTML/amsWebPlacementLink.jsp?site=<Defined Programmatic Access Name of Site>&page=<Defined Programmatic Access Name of Page>&location=<Location code defined in location lookups>`

---

**Note:** The jsp to be used for HTML Applications is `amsWebPlacementLink.jsp`.

---

2. The API that could be embedded in the HTML code would look something like following

```
-----
<!-- BEGIN Web Placements Tag -->
<script language="JavaScript"
src="http://www.mysite.com:8000/OA_
HTML/amsWebPlacementLink.jsp?site=MYSITE&page=HOME&location=TOP_CENTER">
</script>
<noscript>
</noscript>
<!-- END Web Placements Tag -->
-----
```

## 4.1.7 Implementing Scripts for Campaigns

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

Using the Oracle Scripting Author scripts and surveys are created. After the Script is created, a marketer associates the script or survey to a Campaign Schedule. For more information about Scripting Author see *Oracle Marketing Scripting Integration Guide*.

To understand and implement Scripting for marketing purposes see the following sections:

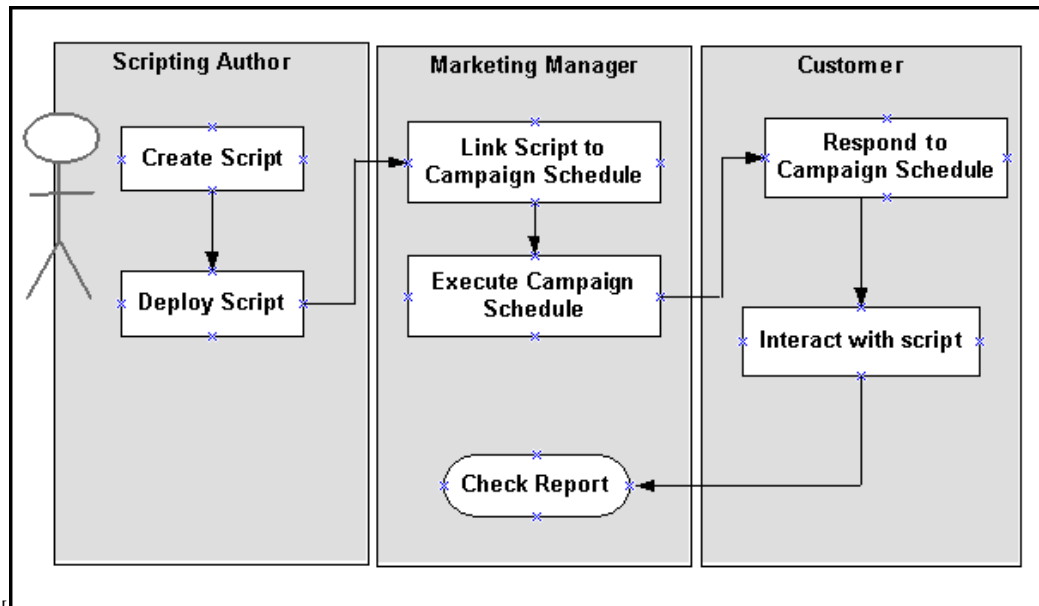
- [Section 4.1.7.1, "Process Diagram for Creating Scripts"](#)
- [Section 4.1.7.2, "Deploying Scripts into the Database"](#)
- [Section 4.1.7.3, "Creating a Survey Deployment"](#)

- [Section 4.1.7.4, "Attaching Scripts to a Campaign Schedule"](#)
- [Section 4.1.7.5, "Attaching Survey Deployment to a Campaign Schedule"](#)
- [Section 4.1.7.7, "Seeded Script: Customer Authentication Building Block"](#)
- [Section 4.1.7.8, "Seeded Script: Event Registration"](#)
- [Section 4.1.7.9, "Seeded Script: Lead Creation"](#)
- [Section 4.1.7.10, "Seeded Script: Customer Data Acquisition"](#)
- [Section 4.1.7.11, "Implementing Scripting and Survey Reports"](#)
- [Section 4.1.7.12, "Understanding Script Dashboard Reports"](#)

#### 4.1.7.1 Process Diagram for Creating Scripts

The following diagram depicts the sequence of tasks and interactions for integrating a script into a marketing campaign.

**Figure 4–1 Process Flow Diagram: Creating Scripts**





#### 4.1.7.2 Deploying Scripts into the Database

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

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

##### Prerequisites

None

##### Steps

1. FTP the script from \$AMS\_TOP/scripts directory to your local machine.
2. Launch the Script Author Applet from Scripting Administration Console.
  - For more information on the Script Author Applet refer to the following OracleMetaLink note: *Oracle Scripting (IES) Interaction Center Family Pack P Readme*.
3. Log into jtflogin.jsp as a user with Scripting Administrator responsibility.
4. Select Launch Script Author.

This starts the Script Author applet.
5. In Script Author, open the script (open one at a time).
6. From the Tools Menu, select Deploy Script.

This will deploy the script into the database.
7. Repeat this process for deploying additional (or modified) scripts into the database.

#### 4.1.7.3 Creating a Survey Deployment

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

Use the following sequence when creating a survey deployment:

1. Using Oracle Scripting - create a Survey Campaign.
2. Using Oracle Scripting - create a cycle for the Campaign.
3. Using Oracle Scripting - create a Survey deployment.

4. Using Oracle Marketing - attach deployed survey to its appropriate CTD.

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

- Header section
- Footer section
- Error section
- Final section

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

The following jsp survey resources are seeded with the product:

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

If launching a Web script from Oracle iStore, generally the last page of the script will be a “thank you” page. For example, the last page could be the `amsScriptThankyou.jsp`. In this case, it is recommended that you insert a link (in the thank you page) directing users back to a designated iStore page.

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

#### **4.1.7.4 Attaching Scripts to a Campaign Schedule**

Deployed scripts are attached to a Campaign Schedule using the Campaign Schedule’s inbound or outbound Contact Points. The contact points are added under the Collaboration side navigation menu.

#### **4.1.7.5 Attaching Survey Deployment to a Campaign Schedule**

After the script has been added to the contact point, the survey deployment needs to be added to the content side navigation menu (within the campaign schedule). Because a script can contain multiple survey deployments, you must specify scripts at contact point level.

To attach a survey deployment to an existing campaign schedule use the following procedure:

### Prerequisites

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

### Steps

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

This LOV contains only those survey deployments created for the scripts attached to the Campaign Schedule's contact point. For more information see [Section 4.2.6.3, "Understanding Click-Through Actions"](#).

5. Select Update to save your work.

#### 4.1.7.6 Implementing Seeded Scripts

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

Scripting Marketing Activities:

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

Seeded Scripts:

- amscauth.scr - Customer Authentication (building block)

- amserb2b.scr - B2B Event registration
- amserb2c.scr - B2C Event registration
- amserwca.scr - Event registration with customer authentication
- amsldb2c.scr - B2C Lead creation
- amsldb2b.scr - B2B Lead creation
- amsldwca.scr – Lead creation with customer authentication
- amsdatacq.scr - Data acquisition

The following scripts are not supported in a single sign environment:

- amscauth.scr - Customer Authentication (building block)
- amserwca.scr - Event registration with customer authentication
- amsldwca.scr – Lead creation with customer authentication
- amsdatacq.scr - Data acquisition

To implement seeded scripts see the following:

- [Section 4.1.7.7, "Seeded Script: Customer Authentication Building Block"](#)
- [Section 4.1.7.8, "Seeded Script: Event Registration"](#)
- [Section 4.1.7.9, "Seeded Script: Lead Creation"](#)
- [Section 4.1.7.10, "Seeded Script: Customer Data Acquisition"](#)

### **4.1.7.7 Seeded Script: Customer Authentication Building Block**

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

The Customer Authentication Building Block script provides the following functionality:

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

#### 4.1.7.8 Seeded Script: Event Registration

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

Three seeded scripts are shipped for Event Registration:

- amserb2b.scr - B2B Event registration
- amserb2c.scr - B2C Event registration
- amserwca.scr - Event registration with customer authentication

To implement Event Registration Scripts use the following procedure:

##### Prerequisites

- A registrable Event is available.
- Scripts are deployed.
- Survey is deployed.
- Script and Survey is attached to a Campaign Schedule.
- Oracle One-to-One Fulfillment is implemented.

##### Steps

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

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

6. Save your work.

#### 4.1.7.9 Seeded Script: Lead Creation

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

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

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

The following scripts are seeded for Lead Creation:

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

To implement a Lead creation script follow the procedure below:

#### Prerequisites

- Scripts are deployed.
- Survey is deployed.
- Script and Survey is attached to a Campaign Schedule.

#### Steps

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

For the Lead scripts it is not necessary to pick the Event object from the Event LOV.

5. Save your work.

#### 4.1.7.10 Seeded Script: Customer Data Acquisition

This script enhances customer profiles improving segmentation, campaign personalization and customer specific offers. The goal of this script (from a business perspective) is to acquire additional data about a customer (by way of a survey.) By default, this script is paired with the customer authentication building block.

The following fields are used to capture customer information in the TCA HZ\_PERSON\_PROFILES table:

- DATE\_OF\_BIRTH
- PLACE\_OF\_BIRTH
- GENDER
- MARITAL\_STATUS
- MARITAL\_STATUS\_EFFECTIVE\_DATE
- PERSONAL\_INCOME
- HEAD\_OF\_HOUSEHOLD\_FLAG
- HOUSEHOLD\_INCOME
- HOUSEHOLD\_SIZE
- RENT\_OWN\_IND

To implement the data acquisition script use the following procedure:

#### Prerequisites

- Scripts are deployed.
- Deployed Script and Survey are attached to a Campaign Schedule.

#### Steps

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

For the data acquisition script it is not necessary to pick the Event object from the Event LOV.

5. Save your work.

#### **4.1.7.11 Implementing Scripting and Survey Reports**

The survey data report is available for those scripts attached as inbound/outbound contact points of a Campaign Schedule.

The following reports are available:

- Number of people who have started the survey.
- Number of people who have completed the survey.
- Report for questions with pre-defined list of answers.

If the answers are based on a query or API, the last report will not display the data.

#### **4.1.7.12 Understanding Script Dashboard Reports**

A deployed seeded script can be evaluated using a Dashboard Report. These reports are intended for “Marketing Research” types of Web scripts. The list of values is pre-defined using Script Author. The list of values must have “Specific Lookup” associated with them. For more information on Specific Lookup, refer to *Oracle Scripting User Guide*.

Reporting is possible for the following lookup types:

- Dropdown
- Radio Button
- Checkbox Group
- Multi select List

The following questions fall under the required criteria. Therefore, the following questions can be reported on.



**Table 4–6 Scripting Reports**

| <b>Script Name</b>                              | <b>Question</b>  | <b>Description</b>  | <b>Question Type</b>   |
|---|--|---|--|
| Event Registration with Customer Authentication | <ol style="list-style-type: none"> <li>1. Select One:</li> <li>2. Select One:</li> <li>3. Select One:</li> <li>4. Event Registration Options:</li> </ol>                       | <ol style="list-style-type: none"> <li>1. From Sign-In Page of Customer Authentication Block</li> <li>2. From Sign-In Page of Customer Authentication Block</li> <li>3. From Sign-In Page of Customer Authentication Block</li> <li>4. From Event RegistrationPage</li> </ol> | <ol style="list-style-type: none"> <li>1. Radio Button</li> <li>2. Radio Button</li> <li>3. Radio Button</li> <li>4. Radio Button</li> </ol> |
| Lead Creation with Customer Authentication      | <ol style="list-style-type: none"> <li>1. Select One</li> </ol>  | <ol style="list-style-type: none"> <li>1. From Sign-In Page of Customer Authentication Block</li> </ol>   | <ol style="list-style-type: none"> <li>1. Radio Button</li> </ol>  |
| Data Acquisition                                | <ol style="list-style-type: none"> <li>1. Gender</li> <li>2. Are you the head of your household?</li> <li>3. Do you rent or own your house?</li> <li>4. Select one:</li> </ol> | <ol style="list-style-type: none"> <li>1. From Data Acquisition Page</li> <li>2. From Data AcquisitionPage</li> <li>3. From Data AcquisitionPage</li> <li>4. From Sign-In Page of Customer Authentication Block</li> </ol>  | <ol style="list-style-type: none"> <li>1. Radio Button</li> <li>2. Radio Button</li> <li>3. Radio Button</li> <li>4. Radio Button</li> </ol> |
| Customer Authentication Block                   | <ol style="list-style-type: none"> <li>1. Select One</li> </ol>  | <ol style="list-style-type: none"> <li>1. From Sign-In Page of Customer Authentication Block</li> </ol>   | <ol style="list-style-type: none"> <li>1. Radio Button</li> </ol>  |

## 4.2 Administering Campaigns

Administering Campaigns is slightly different than implementing campaigns. Administrative tasks include setups that are on-going and require updates.

To administer Campaigns use the following procedures:

- [Section 4.2.1, "Setting Up Marketing Mediums for Campaigns"](#)
- [Section 4.2.1, "Setting Up Marketing Mediums for Campaigns"](#)
- [Section 4.2.2, "Setting Up Campaign Triggers"](#)
- [Section 4.2.3, "Setting Up Activities for Campaigns"](#)
- [Section 4.2.4, "Setting Up Marketing Source Codes"](#)
- [Section 4.2.5, "Setting Up the Marketing Calendar"](#)
- [Section 4.2.6, "Setting Up Click-Through-Destinations for Campaigns"](#)
- [Section 4.2.7, "Setting Up Oracle Personalization for Campaigns"](#)
- [Section 4.2.8, "Setting Up Campaign Budgets"](#)
- [Section 4.2.9, "Setting Up Offers for Campaigns"](#)

### 4.2.1 Setting Up Marketing Mediums for Campaigns

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

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

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

#### 4.2.1.1 Process Flow for Creating Marketing Mediums

The following flow describes the process for creating a marketing medium.

1. Determine Business requirements for Marketing Mediums.

2. Create Marketing Medium. This task is performed by the Oracle Marketing Administrator.
3. Attach marketing medium to the channel (activity) which will be used for schedule execution.
4. Create a Campaign. This task is performed by a marketer or user.
5. Create Campaign Schedule. This task is performed by a marketer or user.
6. Include Marketing Medium as part of the Campaign Schedule. This task is performed by a marketer or user.

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

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

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

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

Use the following administrative procedure to create Marketing Mediums:

### Prerequisites

- Marketing Campaign is created
- Campaign Schedule is created

### Steps

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

- Activity: Choose the appropriate activity for which this medium will support. For example, if the Marketing Medium is Direct Mail House, choose Direct Mail for the activity.
5. Select Create.
- Confirmation text appear on the page indicating that changes are saved. After the Marketing Medium has been created by the Administrator, the Marketer can then use the Marketing Medium as part of the Campaign Schedule.

## 4.2.2 Setting Up Campaign Triggers

Triggers enable marketers to improve marketing communications by automatically executing campaigns when specific customer or business situations arise.

This functionality is particularly valuable because customers have become sensitive to mass and/or inappropriate marketing communications. Therefore, the trigger's precise ability to execute campaigns based on timing and relevance provides a key marketing advantage.

Oracle Marketing includes the following Campaign trigger functionality:

- Trigger for Date Based Repeating Schedules: Allows a marketer to create repeating campaign schedules that repeat based on a date frequency.
- Trigger for Single Condition Based Repeating Schedules: Enables a marketer to execute a "follow-up" campaign schedule based on the satisfaction of single condition.
- Trigger for Single Condition Based Notifications: Enables a notification to be automatically sent (to a specified resource) each time a specific criteria is met.
- Stop Trigger Functionality: Enables a marketer to immediately stop a trigger.

### 4.2.2.1 Trigger Terms and Definitions

Prior to using, implementing, or customizing triggers review the terminology listed in the table below.

**Table 4–7 Trigger Terms and Definitions**

| Term                               | Definition  |
|------------------------------------|---|
| Trigger                            | A mechanism that enables an action to be performed on a specific Marketing object. This mechanism is either date based or date <i>and</i> condition based. If the condition defined for the trigger is satisfied then an action is invoked.   |
| Trigger Action                     | <p>Once a condition is met, the trigger kicks off an action. The trigger action determines what happens next.</p> <p>The following actions are supported:</p> <p>Seeded Marketing Actions:</p> <ul style="list-style-type: none"> <li>■ Sends notification to a specified resource</li> <li>■ Executes associated campaign schedules</li> </ul> <p>Custom Marketing Actions:</p> <ul style="list-style-type: none"> <li>■ Using custom logic, a non-seeded action can be created.</li> </ul>                                    |
| Trigger Condition                  | <p>A condition specifies what the trigger will monitor. Trigger conditions use metrics to measure and compare the performance of Marketing objects.</p> <p>Supported Trigger Conditions:</p> <ul style="list-style-type: none"> <li>■ Metric to Metric Comparison</li> <li>■ Metric to Value Comparison</li> <li>■ Metric to Workbook Comparison</li> </ul>   |
| Metrics                            | <p>Oracle Marketing uses metrics to measure the performance of Marketing objects. Many metrics are seeded with the application - if not seeded, a metric can be created manually.</p> <p>The trigger functionality uses metrics to compare Marketing object values; the result of this comparison becomes the trigger condition.</p> <p>When the defined trigger condition is met an action is invoked. In other words, metrics (by being compared to another metric, value, or workbook) cause a trigger action to invoke.</p> |
| Metric to Metric Trigger Condition | <p>Compares a Marketing object's metric value to another Marketing object's metric value.</p> <p>For example, campaign forecasted responses (metric) can be compared to campaign actual responses (metric). If the specified condition is met (forecasted responses is equal to actual responses) an action is invoked.</p>   |
| Metric to Value Trigger Condition  | <p>Compares a Marketing object's metric value to another value.</p> <p>For example, campaign responses (metric) can be compared to 20,000 (value). If the operator (=) is selected, once the campaign responses = 20,000 a trigger initiates an action.</p>   |

**Table 4–7 Trigger Terms and Definitions (Cont.)**

| Term                                 | Definition   |
|--------------------------------------|--|
| Metric to Workbook Trigger Condition | <p>Compares a Marketing object's metric value to a Discoverer workbook value. When using this type of condition, a metric value is compared to a remote data source (using a workbook).</p> <p>For example, a person's monthly spending (metric) can be compared to his/her average monthly spending (calculated using Discoverer workbook).</p>   |
| Date Based Trigger                   | <p>This type of trigger is based on a predetermined date and time, it does not monitor a condition. In this case, the date criteria replaces the trigger condition. When the predetermined start date is met the trigger action begins.</p> <p>Repeating date based triggers can be created enabling a schedule to automatically re-run on an hourly, daily, monthly, quarterly, or yearly basis.</p>  |
| Repeating Schedules                  | <p>Repeating schedules can re-run based on a date or single condition criteria.</p> <p>When a repeating schedule re-executes, a new copy of the schedule is made - the original schedule is preserved. When the condition is met, the trigger picks up the new schedule; the schedule runs based on its defined criteria.</p> <p>The new schedules executes and the old schedule is preserved. In other words, each execution is a new instance of the schedule, therefore a marketer is able to separately track campaign responses for each schedule.</p> <p>For example, a trigger activates schedule A and it runs for a specific period of time. When schedule A is ready to repeat (based on the repeat unit), a copy of schedule A's information is made and becomes schedule B. Schedule A's information is preserved, schedule B becomes the active schedule. This cycle repeats until the trigger end date is reached. All schedule information is separately preserved - therefore, it can be individually viewed for tracking purposes.</p> <p>For more information about repeating schedules, see the following:</p> <ul style="list-style-type: none"> <li>■ <a href="#">Section 4.2.2.3, "Creating a Date Based Repeating Schedule"</a></li> <li>■ <a href="#">Section 4.2.2.4, "Execute Associated Campaign Schedule based on Single Condition"</a></li> </ul> |

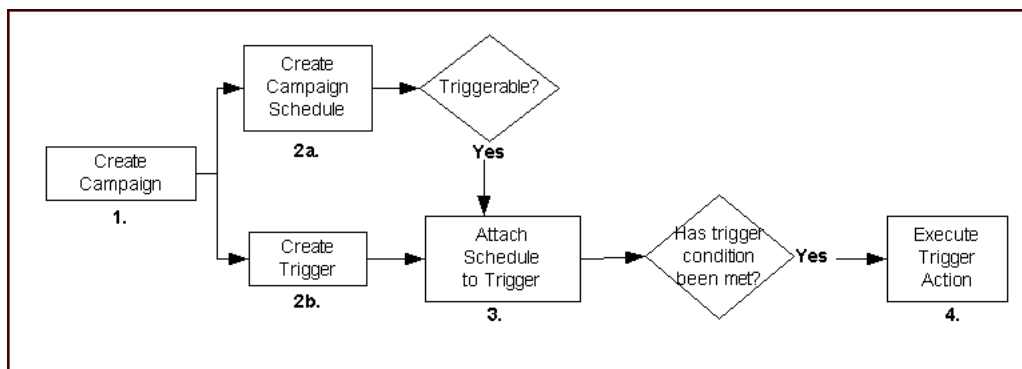
**Table 4–7 Trigger Terms and Definitions (Cont.)**

| Term                      | Definition  |
|---------------------------|---|
| Trigger Monitor Frequency | <p>Defines the frequency in which conditions are checked for satisfaction. A trigger runs for a set period of time and conditions are verified only for that period.</p> <p>Trigger Monitor Frequency Determinants:</p> <ul style="list-style-type: none"> <li>■ Start and End Date</li> <li>■ Time Zone</li> <li>■ Repeat Every (for example, every 1 hour, 2 days, 1 week, etc.)</li> </ul> <p>Triggers Repeat Units:</p> <ul style="list-style-type: none"> <li>■ Hour</li> <li>■ Day</li> <li>■ Week</li> <li>■ Month</li> <li>■ Quarter</li> <li>■ Year</li> </ul> |
| Trigger Notification      | A Workflow notification sent to a specified resource. Once a trigger condition is met, if the action is setup to send a notification, one will be sent to the specified resource.   |
| Trigger Workflow          | The major functionality behind triggers is provided by Oracle Workflow.   |

#### 4.2.2.2 Trigger Functional Flow Diagram

Prior to implementing or using triggers, review the functional flow diagram.

**Figure 4–2 Trigger Functional Flow**



### 1. Create Campaign

When creating a campaign, a marketer creates one or more campaign schedule for it. If using a trigger, the campaign must be of type Direct Marketing: e-mail, telemarketing, direct mail, or fax.

### 2. Create Schedule and Trigger

#### a. Create Campaign Schedule

A campaign schedule (of type Direct Marketing - Email, Fax, Mail, Telemarketing) is created for the campaign. The schedule must be marked as “Triggered” and can be repeating or one-time.

#### b. Create Trigger

Triggers are created at the campaign level but associated at the campaign schedule level. Once a campaign schedule is associated with a Trigger, it executes depending on when the condition or date is met.

### 3. Attach Schedule to Trigger

Once a campaign schedule is available it can be associated to a Trigger. When the Trigger condition is satisfied, the schedule is available for automatic execution.

### 4. Execute Trigger Action

Execution is automatic if the condition is met. A marketer can use a seeded action or create a custom action.



### 4.2.2.3 Creating a Date Based Repeating Schedule

This feature enables a marketer to create a campaign schedule that is triggered to repeat based on a date frequency.

#### Scenario

Amy works in the marketing department at a large retail chain. She has determined that online clothing sales are slow at the end of the month. As a result, Amy needs to create an e-mail blast that starts on June 28 and repeats monthly. Amy wants the e-mail blast to include only recent sign-ups - previously contacted customers must be excluded.

#### Solution

Amy has created a campaign schedule (of type direct marketing - email) that repeats monthly on the 28th day. When repeating, the schedule is marked to “excludes previous entries from target group” therefore, the e-mail blast is sent only to new customers.

#### Prerequisites

- Campaign is created
- Campaign is activated
- Campaign Schedule of type Direct Marketing - e-mail is created
- Campaign Schedule contains valid target group

#### Steps

1. Log in to Oracle Marketing.
2. Navigate to Campaign > Campaigns.
3. On the Campaigns landing page, select the campaign for which you are creating a repeating schedule.
4. Select Trigger.

The Campaign Details - Trigger page opens. Exact navigation path depends on release number and custom setup groupings.

5. Select **Create**.
6. Enter the following information:
  - Trigger Name: Monthly Email Blast

- Type: Date Based
  - Description: Date based repeating Schedule test
7. Enter the following Monitor Setup information:
    - Time Zone: Select the time zone that applies for your implementation
    - Start Date: Today's Date
    - End Date: 4 months after start date
    - Every: Use these fields to specify the repeat frequency
    - In the blank text box enter 1. This is the numeric value for the repeat frequency.
    - Using the drop-down menu, select months.
  8. Place a check in the Execute Associated Schedules check box.  
 If this check box is not checked, the campaign schedule associated to this Trigger will not execute.
  9. Select **Create**.

**Figure 4–3 Date Based Trigger**

\*Trigger Name

Monthly Email Blast Test

\*Type

Date Based

Description

Date based repeating schedule test

Monitor Setup

\*Time Zone

America/Chicago

\*Start Date

19-06-2003

Start Time

12

00

AM

\*End Date

11-05-2004

End Time

12

00

AM

Every

1

Months

Actions

Select one or more actions to perform once the condition is satisfied.

Send Notification

☐

Execute Associated Schedules

☒

All schedules associated to this trigger are activated.

10. Navigate to the Campaign Schedule for this campaign.

Exact navigation path depends on release number and custom setup groupings.

11. Navigate to the Trigger Details section (lower region of the Campaign Schedule - Details page.)
12. Highlight Use Trigger.
13. In the Use Trigger drop-down menu, select Monthly Email Blast.
14. Place a check in the Repeat check box.

This enables the campaign schedule to repeat based on the frequency specified in the Trigger - details page.
15. Place a check in the Exclude previous entries from Target Group check box.
16. Select Update to save your work.
17. Verify that the status of campaign schedule is Available.
18. Save your work.

### **What Happens Next?**

A date based repeating campaign schedule has been created. Because the campaign schedule is marked to repeat and the Trigger is date based, the campaign will repeat on the 28th day of each month.

When the Trigger condition (date = 28) is met, the campaign schedule re-executes and sends out an e-mail blast to the target group. Previously contacted customers will be excluded from the e-mail blast.

#### **4.2.2.4 Execute Associated Campaign Schedule based on Single Condition**

This functionality enables a marketer to execute a “follow-up” campaign schedule based on the satisfaction of a single condition.

### **Scenario**

Bob is the marketing director at Willow Software Company. His group is launching the new release of their flagship product, Willow 9x. To determine if the planned messaging for the launch will be effective, Bob sets up a test email campaign schedule to a subset of the target audience for the launch campaign. If the response to this test schedule is good, Bob wants to automatically expand the email message to a larger target audience using a triggered campaign schedule.

## Solution

Bob creates a campaign called Willow 9x Release with two child campaign schedules: "test schedule" and "primary schedule". The campaign contains a single condition based trigger that executes an action (execute associated schedules, in this case the "primary schedule") when/if actual responses for the test schedule are greater than the forecast responses. When the trigger condition is met, a notification is send to Bob and the primary schedule is activated. This trigger automatically expands the successful email message to a larger audience.

## Prerequisites

- Campaign is created
- Campaign is activated
- Two campaign schedules (listed below) of type direct marketing - email are created:
  - Test schedule for product launch
  - Primary schedule for product launch
- Test schedule forecasted responses count is set to 1000
- Test schedule is activated

## Steps

1. Log in to Oracle Marketing.
2. Navigate to Campaign > Campaigns.
3. On the Campaigns landing page, select the Campaign for which you are creating a trigger.
4. Select Trigger.

The Campaign Details - Trigger page opens.Exact navigation path depends on release number and custom setup groupings.

5. Select **Create**.
6. Enter the following general information:
  - Trigger Name: Willow\_9x\_Release
  - Type: Metric to Metric

In this example Actual Responses Count (metric) is being compared to Forecast Responses Count (metric).

- Description: Optionally enter a description for the Trigger
- 7. Enter the following Monitor Setup information:
  - Time Zone: Select the time zone that applies.
  - Start Date: Today's Date
  - End Date: 3 months after start date
  - Every: Use these fields to specify the repeat frequency
  - In the blank text box enter 1. This is the numeric value for the repeat frequency.
  - Using the drop-down menu, select weeks.
  - By setting this value to every 1 week, the trigger will check the condition for satisfaction once per week.
- 8. In the Condition section, specify the metric comparison parameters.

Condition set 1 (metric):

- Object Type: Campaign Schedule
- Object Name: Using the flashlight icon, select the campaign schedule in which this Trigger condition applies. In this example, select TEST CAMP SCHEDULE.
- Metric Name: Responses Count
- If the expected seeded metric is not appearing in the metric name drop-down menu you might need to add the metric to the marketing object's available metrics. For more information, see the *Oracle Marketing User Guide*.
- Metric Type: Actual Value
- Comparison set 2 (metric):
- Operator: Select (>)

In this example, the trigger business requirements call for the primary campaign schedule to be executed if actual responses for the test campaign schedule are "greater than" forecasted responses. Therefore, the metric comparison uses the > operator.

- Object Type: Campaign Schedule

- Object Name: Using the flashlight icon, select the campaign schedule in which this Trigger condition applies. In this example, select TEST CAMP SCHEDULE.
  - Metric Name: Responses Count

If the expected seeded metric is not appearing in the metric name drop-down menu you might need to add the metric to the marketing object's available metrics. For more information, see the *Oracle Marketing User Guide*.
  - Metric Type: Forecast Value
9. Place a check in the Send Notification check box. Select the flashlight icon to select the resource that will receive the notification.

The notification will be sent when the trigger condition is met.
  10. Place a check in the Execute Associated Schedules check box.
  11. Select **Create**.

**Figure 4–4 Execute Associated Campaign Schedule based on Single Condition**

|  |   |   |              |
|--|---|---|--------------|
| *Trigger Name  | Willow_9x_Release   |   |              |
| *Type  | Metric to Metric  |   |              |
| Description  | For the Test Campaign Schedule, if actual response values are greater than forecasted response values, the Willow_9x_Release_Trigger will execute associated schedule (Willow 9x Release Product Launch). |   |              |
| <b>Monitor Setup</b>   |   |   |              |
| *Time Zone   | America/Los_Angeles   |   |              |
| *Start Date  | 05-SEP-2003 (example: 15-Dec-2000)  | Start Time  | 12 00 AM     |
| *End Date  | 30-NOV-2003 (example: 15-Dec-2000)  | End Time  | 12 00 AM     |
| Every  | None  |   |              |
| <b>Condition</b>   |   |   |              |
| *Object Type   | Campaign Schedule   | >   | *Object Type |
| *Object Name   | TEST CAMP SCH   |   | *Object Name |
| *Metric name   | Responses Count   |   | *Metric name |
| *Metric Type   | Actual Value  |   | *Metric Type |
| <b>Actions</b>   |   |   |              |
| Select one or more actions to perform once the condition is satisfied. |   |   |              |
| Send Notification  | <input checked="" type="checkbox"/>   | Smith, Elizabeth  |              |
| Execute Associated Schedules   | <input checked="" type="checkbox"/>   | All schedules associated to this trigger are activated. |              |

12. Navigate to the primary campaign schedule for this campaign.  
Exact navigation path depends on release number and custom setup groupings.  
On the Campaign Schedule - Details page scroll to the Trigger Details section.
13. Highlight Use Trigger.
14. In the Use Trigger drop-down menu, select Willow\_9x\_Release.
15. Select **Update**.
16. Save your work.

### What Happens Next?

The trigger monitor has been set to re-run each week. When the trigger monitor runs, if the actual responses for the test schedule are greater than the forecast responses, the primary schedule for the product launch is activated and a

notification is sent to Bob. The outcome of this trigger is to expand the successful email message from the test schedule to a larger audience.

#### **4.2.2.5 Sending a Notification Based on the Satisfaction of a Single Condition**

This feature enables you to setup a trigger to send a notification when a single condition is met.

##### **Scenario**

Tom is creating a Mother's Day floral campaign. Tom manages the marketing group therefore, he needs to monitor the marketing campaign budget. As a result, Tom needs to setup a trigger for this campaign to notify him if he is within \$25,000 of his total budget. Tom's total campaign budget is \$400,000. Therefore, he wants to be notified if the Mother's Day floral campaign costs cause him to reach \$375,000.

##### **Solution**

Tom has created a trigger that sends him a notification when campaign costs are within \$25,000 of his total budget. Therefore, Tom will receive an e-mail notification if his costs reach \$375,000.

##### **Prerequisites**

Campaign is created

##### **Steps**

1. Log in to Oracle Marketing.
2. Navigate to Campaign > Campaigns.
3. On the Campaigns landing page, select the campaign for which you are creating a repeating schedule.  
The Campaign Details page open.
4. Select Trigger.  
The Campaign Details - Trigger page opens.  
Exact navigation path depends on release number and custom setup groupings.
5. Select **Create**.  
The Trigger Create page opens.
6. Enter the following general information:



- Trigger Name: Floral Campaign monitor
  - Type: Metric to Value
  - Description: Optionally enter a description for the Trigger
7. Enter the following Monitor Setup information:
- Time Zone: Select the time zone that applies to your area
  - Start Date: Select Today's date
  - End Date: 4 months after start date
  - Every: Use these fields to specify the repeat frequency
  - In the blank text box, enter 1.
  - Using the drop-down menu, select hours.
8. In the Condition section select the metric comparison values.
- Comparison set 1 (Metric):
- Object Type: Campaign
  - This is the Metric object type for the first side of the comparison.
  - Object Name: Using the flashlight icon, select the campaign in which this Trigger condition applies.
  - Metric Name: Total Cost
  - If the expected seeded metric is not appearing in the metric name drop-down menu you may need to add the metric to the marketing objects available metrics. For more information, see the *Oracle Marketing User Guide*.
  - Metric Type: Actual Value
- Comparison set 2 (Value):
- Operator: Select >
  - Value: \$375,000
  - Enter the numeric value for the operator (selected previously).
- In this example, the Trigger needs to execute if the Mother's Day floral Campaign costs cause the manager to come within \$25,000 of the total budget.
- Because of these requirements, the values are:

- Metric: Total Campaign Costs
- Operator: >
- Value: \$375,000

9. Select **Create**.

10. Navigate to the campaign schedule for this campaign.

11. Highlight Use Trigger.

12. In the Use Trigger drop-down menu, select Floral Campaign budget monitor.

13. In the Send Notification to text box, select the resource in which the notification will be sent.

This person must exist as a resource in the JTF\_RESOURCES table.

14. Select Update.

15. Verify that the campaign schedule status is Available.

16. Save your work.

### **What Happens Next?**

The Trigger is marked to send notifications, therefore the marketing manager will receive an email notification if the Mother's Day floral campaign costs come within \$25,000 of the total budget. In order for this to happen, the marketing manager must exist as a resource in the system.

#### **4.2.2.6 Stopping a Trigger**

This feature enables a marketer to stop a trigger at any given time.

### **Scenario**

John is the marketing manager for an annual Summer Khaki Shorts campaign. Starting in May, each Monday an email blast needs to be sent to a target group. The exact length of the campaign is unknown because summer duration depends on annual weather patterns. As a result, John needs the flexibility to immediately stop the campaign.

### **Solution**

Unfortunately, this summer the weather became cool sooner than expected. John was able to manually terminate the trigger and immediately stop the Summer Khaki Shorts Campaign.

## Prerequisites

- Campaign is created
- Campaign Schedule is active
- Campaign Schedule is associated to an active Trigger

## Steps

1. Log in to Oracle Marketing.
2. Navigate to Campaign > Campaigns.
3. On the Campaigns landing page, select the campaign that currently contains the Trigger.
4. Select Execution.
5. Select Trigger.  
Exact navigation path will depend on your release number and custom setup groups.
6. Select **Stop Trigger**.

## What Happens Next?

Because the Trigger has been stopped, the campaign schedules it is associated with will no longer execute based on the conditions specified by the Trigger. In other words, the Trigger is immediately terminated and the schedule must execute using another Trigger or by using manual methods.

### 4.2.2.7 Customizing Triggers

Oracle Marketing ships with seeded business events that are used by the Trigger Workflow to launch seeded actions. The seeded Marketing Trigger process is a workflow process that gets initiated when a Marketing trigger's next run time has reached. This could be either the original start time of the trigger, or a scheduled time for the trigger repetition (if the trigger repeats at a specific interval).

To display processes in Oracle Workflow Builder, use the following procedure:

1. From the file menu, choose Open from (and connect to the database.)
2. Open item type "OMO Triggers" from the database.
3. Expand the data source
4. Then expand the item type branch within that data source.

5. Expand the Processes branch within your item type.
6. Select the process activity to display the diagram of the process in a Process workflow.

If these actions do not meet your business requirements, you can subscribe to a seeded event and add your own custom logic. By doing so, you can define your own actions. To accomplish this, you will subscribe your custom logic to the seeded event:

`oracle.apps.ams.Trigger.TriggerCustomActionEvent`

Although this expands the seeded Workflow - it does not fundamentally change it.

### **Oracle Marketing Trigger Item Type**

The Trigger Workflow process is associated with an item type called OMO Triggers. This item type identifies all workflow processes that are needed to enable the Marketing Trigger functionality.

Currently there are four different processes in the OMO Triggers item type:

- Trigger Process: The main process -- getting run as a subscription to the Workflow Business Event OMO Trigger Event (`oracle.apps.ams.trigger.TriggerEvent`). The following processes are sub flows of this main process flow.
  - Perform All Actions
  - Execute Schedule
  - Schedule Approval

For more information see the *Oracle Marketing Release Note for Trigger Enhancement*.

#### **4.2.2.8 Running Workflow Agent Listener for Triggers**

To initiate triggers, Workflow Agent Listener must be running on WF\_DEFERRED.

To properly initiate triggers, use the following guidelines:

1. Start Fulfillment Server.
2. Have Workflow Agent Listener running on the following agents:
  - WF\_DEFERRED
  - WF\_ERROR

For more information about trigger workflow, see the Oracle Marketing *Trigger Enhancement* release note posted on *OracleMetaLink*.

## 4.2.3 Setting Up Activities for Campaigns

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

To understand and implement Activities see the following sections:

- [Section 4.2.3.1, "Understanding Activity Types"](#)
- [Section 4.2.3.2, "Seeded Activities and Activity Types"](#)
- [Section 4.2.3.3, "Setting Up an Activity"](#)

### 4.2.3.1 Understanding Activity Types

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

Activities can be created within the application and can be linked to an existing Activity Type. When an Activity Type is selected for a Object Create or Custom Setup, the Activities that has been created for the Activity Type will populate the Activity LOV.

The following Activity Types are seeded:

- Advertising
- Web Advertising
- Web Promotions
- Direct Marketing
- In-Store
- Press and Analyst Relations
- Web Marketing
- Web Dynamic Recommendation
- Events
- Sales

#### **4.2.3.2 Seeded Activities and Activity Types**

The following is a list of seeded activities for activity types

- Advertising:
  - Banner Ads
  - Billboard
  - Brochures/Booklets
  - Directories
  - Display Signs
  - Magazine
  - Motion Pictures
  - Netcast
  - Newspaper
  - Posters/Leaflets
  - Print Ads
  - Radio
  - TV
- Direct Marketing:
  - Catalog Direct Mail
  - Email
  - Fax
  - Magazine Insert
  - Telemarketing
- In-Store:
  - Display
  - End-Aisle
  - Grounders
  - Kiosk
  - Menu Boards

- Package-Inserts
- Packaging-Outer
- Point-of-Purchase Displays
- Shelf
- Shop around
- Press and Analyst Relations:
  - Article
  - Briefing
  - Community Relations
  - Company Magazine
  - Crisis Communications
  - Internal Communications
  - Investor Relations
  - Lobbying
  - Press Conference
  - Publications
  - Release
  - Tour

#### **4.2.3.3 Setting Up an Activity**

Use the following procedure to create an activity:

##### **Prerequisites**

None

##### **Steps**

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Activity.
3. Enter an Activity Name.
4. Select an Activity Type.

5. Mark Active. Only Active Activities are available within the application.
6. Associate Marketing Medium.
7. Click **Go**.
  - a. Select a Marketing Medium from the list of active Marketing Mediums displayed.
  - b. Select Active From and Active To dates. These dates should fall within the Active From and Active To dates of the Marketing Medium.
  - c. Marketing Medium shown up on the Object details page based on the Association of the Marketing Medium with the various activities in the create Activity screen. A single Marketing Medium may be associated with multiple Activities.
8. Save your work.

#### 4.2.4 Setting Up Marketing Source Codes

Source codes are unique identifiers for the following marketing objects:

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

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

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

- [Section 4.2.4.1, "Source Code Construction"](#)
- [Section 4.2.4.2, "Campaign Schedule Source Code Construction"](#)
- [Section 4.2.4.3, "Source Code Schema"](#)



#### 4.2.4.1 Source Code Construction

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

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

#### 4.2.4.2 Campaign Schedule Source Code Construction

Campaign Schedules can copy source code from campaigns or can have their own source code. If the source code is created for schedules, it will be parent campaigns source code and sequence number of the schedule.

#### 4.2.4.3 Source Code Schema

Each marketing object has a column referencing the source code. This source code is unique throughout the application. Given a source code, it can be traced back to its marketing object by looking at the AMS\_SOURCE\_CODES table.

**Table 4–8 Source Code Schema Reference**

| Table                     | Object ID Fields              | Source Code Fields |
|---------------------------|-------------------------------|--------------------|
| AMS_CAMPAIGNS_VL          | CAMPAIGN_ID                   | source_code        |
| AMS_CAMPAIGN_SCHEDULES_VL | SCHEDULE_ID                   | source_code        |
| AMS_EVENT_HEADERS_VL      | EVENT_HEADER_ID               | source_code        |
| AMS_EVENT_OFFERS_VL       | EVENT_OFFER_ID                | source_code        |
| AMS_OFFERS_VL             | OFFER_ID<br>QP_LIST_HEADER_ID | offer_code         |

**Table 4–8 Source Code Schema Reference (Cont.)**

| Table            | Object ID Fields | Source Code Fields  |
|------------------|------------------|---|
| AMS_SOURCE_CODES | SOURCE_CODE_ID   | source_code<br>arc_source_code_for<br>source_code_for_id<br>related_source_code<br>related_source_object<br>related_source_id |

The following table shows definitions for the AMS\_SOURCE\_CODE table:

**Table 4–9 Table Definitions**

| Column Name         | Field Type   | Description  |
|---------------------|--------------|--|
| SOURCE_CODE_ID      | NUMBER       | Unique identifier for the source code table  |
| SOURCE_CODE         | VARCHAR2(30) | Unique identifier for all the marketing objects. Source codes are communicated to the customers.   |
| SOURCE_CODE_FOR_ID  | NUMBER       | FK to the marketing object to which the source code points to.   |
| ARC_SOURCE_CODE_FOR | VARCHAR2(30) | Four letter code that points to a marketing object (EVEH = Event headers, EVEO = Event Schedules, EONE = One-Off Events, CAMP = Campaigns, CSCH = Campaign Schedules, OFFR = Offers)         |
| ACTIVE_FLAG         | VARCHAR2(1)  | Flag to indicate if the source code is active or not.  |
| RELATED_SOURCE_CODE | VARCHAR2(30) | Source code of the related object. This is used in case of Event promotions. The customer is interested in the related Event that the Campaign is promoting rather than the Campaign itself. |

**Table 4–9 Table Definitions (Cont.)**

| Column Name           | Field Type   | Description   |
|-----------------------|--------------|---|
| RELATED_SOURCE_OBJECT | VARCHAR2(30) | Four letter code that points to the related marketing object (EVEH = Event headers, EVEO = Event Schedules, CAMP = Campaigns, CSCH = Campaign Schedules, OFFR = Offers) |
| RELATED_SOURCE_ID     | NUMBER       | FK to the marketing object to which the related source code points to.  |

## 4.2.5 Setting Up the Marketing Calendar

The Marketing Calendar is a generic calendar available to all marketing users. Different users can have different views of the calendar (however, content is not personalizable at user level). The calendar displays marketing objects based on status and time range.

Marketing calendar supports the following marketing objects

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

To implement the marketing calendar use the following procedure:

- [Section 4.2.5.1, "Assigning Usage to Resource Group"](#)
- [Section 4.2.5.2, "Selecting Calendar Display Parameters"](#)
- [Section 4.2.5.3, "Running Concurrent Program for Calendar"](#)
- [Section 4.2.5.4, "Configuring User Profiles"](#)

### 4.2.5.1 Assigning Usage to Resource Group

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

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

## Prerequisites

None

## Steps

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

### 4.2.5.2 Selecting Calendar Display Parameters

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

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

To specify Calendar parameters follow the procedure below:

## Prerequisites

None

## Steps

1. Log in to Oracle Marketing.

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

#### 4.2.5.3 Running Concurrent Program for Calendar

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

#### 4.2.5.4 Configuring User Profiles

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

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

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

The Calendar Personal Preferences Page opens.

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

## 4.2.6 Setting Up Click-Through-Destinations for Campaigns

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

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

- [Section 4.2.6.1, "Creating URLs for Click-Through Destinations"](#)
- [Section 4.2.6.2, "Tracking Click-Through Destinations"](#)
- [Section 4.2.6.3, "Understanding Click-Through Actions"](#)
- [Section 4.2.6.4, "Implementing Click-Through Destinations for Campaigns"](#)
- [Section 4.2.6.5, "Setting the Server URL"](#)
- [Section 4.2.6.6, "Enabling Encryption for Click-Through Destinations"](#)
- [Section 4.2.6.7, "Setting Up Default Specialty Store"](#)
- [Section 4.2.6.8, "Setting the Master Inventory Organization"](#)
- [Section 4.2.6.9, "Enabling Click-Through Destination Tracking"](#)
- [Section 4.2.6.10, "Process flow for Creating Click-Through Destinations"](#)
- [Section 4.2.6.11, "Creating Email Click-Through Destinations"](#)
- [Section 4.2.6.12, "Creating Web Advertisement Click-Through Destinations"](#)
- [Section 4.2.6.13, "Creating Web Offers Click-Through-Destinations"](#)
- [Section 4.2.6.14, "Troubleshooting a Click-Through Destination Implementation"](#)

### 4.2.6.1 Creating URLs for Click-Through Destinations

There are 3 ways of creating CTD URLs:

- **Email Content:** A CTD can be created for a Campaign Schedule of type “direct marketing - email”. In this example, the CTD action is “Go To Web Script”. After selecting this action, the user selects the associated Event (in the example,

Event registration). Once the e-mail Campaign Schedule becomes active, a targeted e-mail is sent to a group of customers and or prospects. When the targeted group receives the e-mail and clicks the embedded e-mail link he or she is redirected to a Web page for Event registration.

- **Web Advertisement Content:** For example, a Web advertisement can be placed on the homepage of a Web store using merchandising functionality. In this case, a Campaign Schedule of type “Web Marketing - Advertisement” is used, and the associated click-through destination content is an image displayed on the homepage of the Web store. When a user visits the homepage of the Web store they will see the image, if they choose to click on the image, they will automatically be routed to the specified destination page.
- **Web Offer:** For example, a Web Offer can be placed on the homepage of a Web store using eMerchandising functionality. This Offer can be associated with an image containing the CTD. The associated could be “Go to iStore Shopping Cart with an Item”. Ultimately, the user visits the homepage of the Web store, clicks the image and is routed to the shopping cart page of the Web storefront. The Offer is applied at line level to the shopping cart total.

#### 4.2.6.2 Tracking Click-Through Destinations

Tracking CTDs enables businesses to gain key intelligence about customer behavior. For example, tracking enables marketers to know who responded to the Campaign Schedule (Internet Advertisement or e-mail) that the CTD is part of. Tracked customer and prospect information is stored in Interaction History. Later, it can easily be used for reporting, targeting, and intelligence purposes. To implement tracking for CTDs, see [Section 4.2.6.9, "Enabling Click-Through Destination Tracking"](#).

#### 4.2.6.3 Understanding Click-Through Actions

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

The following actions are seeded with the product:

- **Go to URL:** Sends the user to the defined URL. The URL for this action must be preceded by HTTP:// or HTTPS://.
- **Go to iStore shopping cart:** Uses iStore deep linking functionality to directly forward the user to the shopping cart page. This action is available only if iStore is implemented.

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

#### **4.2.6.4 Implementing Click-Through Destinations for Campaigns**

The following procedures must be performed to implement CTD:

- [Section 4.2.6.5, "Setting the Server URL"](#)



- [Section 4.2.6.6, "Enabling Encryption for Click-Through Destinations"](#)
- [Section 4.2.6.7, "Setting Up Default Specialty Store"](#)
- [Section 4.2.6.8, "Setting the Master Inventory Organization"](#)
- [Section 4.2.6.9, "Enabling Click-Through Destination Tracking"](#)

#### 4.2.6.5 Setting the Server URL

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

#### 4.2.6.6 Enabling Encryption for Click-Through Destinations

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

- Set JTF\_FM\_LENCRIPT\_DELIM to an appropriate delimiter from the list provided.
- Set JTF\_FM\_RENCRYPT\_DELIM to an appropriate delimiter from the list provided.
- For JTF\_FM\_SECURITY\_KEY leave to changeme.

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

#### 4.2.6.7 Setting Up Default Specialty Store

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

#### 4.2.6.8 Setting the Master Inventory Organization

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

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

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

For example:

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

#### 4.2.6.9 Enabling Click-Through Destination Tracking

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

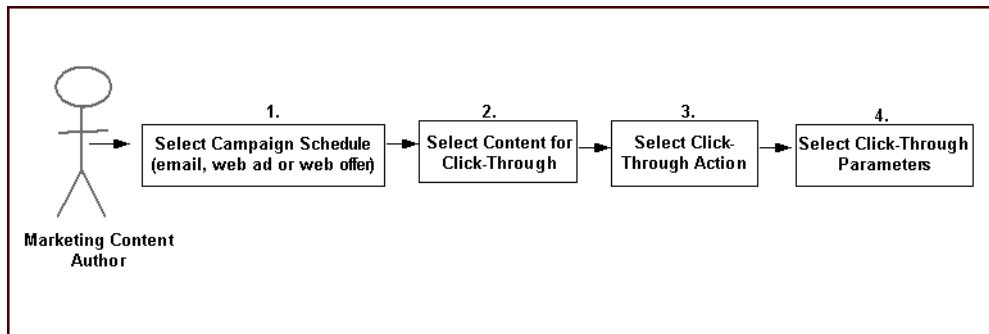
- If set to **Yes**: A checkbox is displayed in the Click-Through-Destination screen tracking is available in the application. This features enables each click-through to be logged in the JTF Interaction History Tables. The logging trail tracks Party-id, Campaign Schedule source code, time, and date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

#### 4.2.6.10 Process flow for Creating Click-Through Destinations

A marketer uses the following process when creating CTDs:

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

**Figure 4–5 Process flow for Creating Click-Through Destinations**



#### 4.2.6.11 Creating Email Click-Through Destinations

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

##### Prerequisites

- AMS : Enable Fulfillment is set to Yes

##### Steps

1. Navigate to Campaigns > Execution > Campaign Schedule.
2. Select **Create**.
3. In the Setup Type LOV select Direct Marketing - Email.

This selection will cause the application to automatically populate the Activity Type to Direct Marketing and the Activity to Email.

4. Enter the following mandatory fields:
  - Name: Give the Campaign Schedule an appropriate name.
  - Language: Select a default language for the Campaign Schedule.
  - Coordinator: Select a default coordinator for the Campaign Schedule.
  - Currency: Select a default currency for the Campaign Schedule.
  - Start Date: Select a default start date for the Campaign Schedule.
  - Time Zone: Select a default time zone for the Campaign Schedule.
5. In the Mail Preferences section enter a subject for the e-mail.

**6. Select Update.**

Once Update is selected a pencil icon appears.

**7. In the Mail Preferences section select the pencil icon.**

The Campaign Schedule Details - Email Content page opens.

**8. Scroll down to the content creation area.**

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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.

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

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

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

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

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By default Oracle Marketing ships with 2 seeded Queries:

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

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

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

- If using Internet Explorer: The content creation area is an iFrame textbox. Highlight the text (to be used in the link) and select the hyperlink icon. The Campaign Schedule Details - Click Through Destination page opens. Using

this page, select an action and related parameters. Select Apply to save your work.

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

**Figure 4–6 Netscape Text Replacement**

The screenshot shows a web interface for editing content. At the top, under the 'Content' heading, there are two radio buttons: 'Text' and 'HTML'. The 'HTML' radio button is selected. Below this, there is a 'Query' label followed by a text input field containing 'Marketing Simple Query'. To the right of the input field is a small icon of a pencil. At the bottom of the interface, there is a large text area containing the following HTML code: `=12290&t=Y&amp=«customer_id»&scd=«SourceCode»">Use Proper Anchor Text</a>`. The text area has a vertical scrollbar on the right side.

12. Select **Update** to save your work.

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

#### 4.2.6.12 Creating Web Advertisement Click-Through Destinations

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

##### Prerequisites

A Campaign using Web advertisements has been created

##### Steps

1. Navigate to Campaigns > Execution > Campaign Schedule.
2. The Campaign Schedule details page opens.

3. Select **Create**.
4. In the Setup Type LOV select Internet Advertisement.

This selection will cause the application to automatically populate the Activity Type to Web Marketing and the Activity to Advertising.
5. Select **Create** to save your work.
6. Navigate to Execution > Content (for the Campaign Schedule defined above).
7. Select **Create**.
8. In the Type drop-down choose one of the following:
  - Web Image: Displays an image to the user. The user clicks the image and is routed to the destination page defined.
  - Web Text: Display text to the user. The user click the text and is routed to the destination page defined.
9. In the Subtype drop-down choose a subtype for the selected Type.
10. In the File textbox, click the flashlight icon.

The file selector navigation window opens. Using this navigator, search and select a stored image. If using an image that has not been uploaded, select Upload New Image.
11. In the Click-Through-Destination section enter an action for the CTD.
  - Based on the action selected, the application will populate available parameters.
  - For example, if the action “Go to iStore Shopping Cart” is selected, the application will populate, next you will be prompted to select a specialty store.
  - You will not be able to preview the Web advertisement in a Web storefront until you are in a runtime environment.
12. Select **Create** to save your work.
13. Navigate to Campaign > Execution > Content.
14. Select the image or text (select the image or text previously selected).
15. Select Preview.

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

#### 4.2.6.13 Creating Web Offers Click-Through-Destinations

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

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

##### Prerequisites

- 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.
2. Select **Create**.
3. In the Type drop-down choose one of the following:
  - Web Image: Displays an image to the user. The user clicks the image and is routed to the destination page defined.
  - Web Text: Display text to the user. The user click the text and is routed to the destination page defined.
4. In the Subtype drop-down choose a subtype for the Type chosen in step 8. For example, if Web Image was selected, the subtype could be full banner or half banner.
5. In the Description textbox, enter a short description for the content.
6. In the File textbox, click the flashlight icon.

The file selector navigation window opens. Using this navigator, you can search and select a stored image. If using an image that has not previously been uploaded, select Upload New Image.
7. In the Click-Through Destination section select the action “Go to Shopping Cart page in iStore with an item”.

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

  - Specialty Store: Use the flashlight icon to launch the “Choose a minisite” navigator. In the Minisite Column, choose the appropriate minisite. This is the Web storefront that is displaying the Web Offer to the user.

- Section: Use the flashlight icon to launch the “Section Selector” navigator. In the section name column, choose the appropriate section. This is the section within the Web storefront that contains the item.
  - Product/Item: Use the flashlight icon to launch the “Product Selector” navigator. In the product name column select the appropriate column. This is the product within the section that is the destination for the Web Offer.
8. Select **Create** to save your work.
  9. Navigate to Campaign > Execution > Content.
  10. Select the content created in step 3.
  11. Select **Preview**.

A Preview window opens displaying either the Web image or Web text selected for the Web Offer.

#### 4.2.6.14 Troubleshooting a Click-Through Destination Implementation

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

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

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

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

**Answer:** Verify that your merge fields in the Click-Through- Destination links are not set up incorrectly. If you have changed the query after creating the CTD, this could be causing the error. If you’ve changed query parameters, you will need to re-create the CTD. If you don’t see customer\_id and source\_code (shown below) in your URL as merge fields that means you need to re-create the CTD.

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

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



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

- JTF\_FM\_L ENCRYPT\_DELIM,
- JTF\_FM\_RENCRYPT\_DELIM and JTF\_FM\_SECURITY\_KEY

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

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

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

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

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

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

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

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

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

8. **Question:** I cannot see all the Sections after I have selected a product. Why?

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

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

**Answer:** Verify the following profiles:

- JTF\_FM\_L ENCRYPT\_DELIM - must be set to an appropriate delimiter from the list provided.

- JTF\_FM\_RENCRYPT\_DELIM - must be set to an appropriate delimiter from the list provided.
  - JTF\_FM\_SECURITY\_KEY - must be set to changeme.
- 10. Question:** I cannot see an Event on the Events LOV even though the Event is Active. Why?
- Answer:** Check the Registration End Date of the Event. The Event LOV shows only those Events which have the Registration End Data later or equal to the current date.
- 11. Question:** When I go to the Cover Letter Details screen, I do not see the iFrame editor to define the CTDs. Why?
- Answer:** Make sure that the profile "Self Service Accessibility Features" is set to No.
- 12. Question:** I don't see the actions "Go to item details" and "Go to Shopping cart" with an item in the actions drop down list. Why?
- Answer:** These actions will not be listed if you don't have any product associated with the schedule. Go to the Offering midtab and associate products to the schedule.
- 13. Question:** I don't see any products under the Product drop-down list. Why?
- Answer:** Go to Products section under the Offering midtab in the Schedule Details page and associate a product to the schedule. Also, make sure the products are Published on the Web.
- 14. Question:** For the action "Go to Shopping cart with an item" for a Web Promotion Schedule, I do not see any offer under the offer dropdown. Why?
- Answer:** Go to the Offers section under the Offering midtab in the Schedule Details page and associate an offer to the schedule.
- 15. Question:** What should I do to track a CTD?
- Answer:** In 11.5.10, all CTDs are tracked, by default if the profile "AMS: Interaction Logging Enabled" is on. Unlike release 11.5.9, there is no option of turning it off and on at the UI level.

## 4.2.7 Setting Up Oracle Personalization for Campaigns

Implementing Oracle Personalization (OP) is an optional Oracle Marketing enhancement used for Web product recommendations. OP is an automated recommendation engine that takes customer data into account and returns an

intelligent product recommendation. Using OP, you can maximize transactions through intelligent product cross-selling and up-selling.

OP makes product recommendations based on:

- Customer
- Customer purchase history
- Product customer is currently viewing

OP is particularly relevant for companies that:

- Have a large customer base
- Have a large number of products (or SKUs)
- Have an online store that tracks customer browsing and purchase information

Oracle Personalization can be setup to make recommendations from the Campaign tab or from the Campaign Workbench. For more information about setting up OP for the Campaign Workbench, see the Oracle*MetaLink* release note titled *Integrating Oracle Application Server Personalization with Oracle Marketing*.

To setup Oracle Personalization to make product recommendations from the Campaign tab see the following:

- [Section 4.2.7.1, "Setting Personalization Profile"](#)
- [Section 4.2.7.2, "Creating Posting Strategy for Oracle Personalization"](#)
- [Section 4.2.7.3, "Configuring Oracle Personalization Strategy Details"](#)
- [Section 4.2.7.4, "Creating Media Items Types"](#)

#### 4.2.7.1 Setting Personalization Profile

Set the following profile to enable personalization for Oracle Marketing.

##### Prerequisites

- OracleAS Personalization10g Version 9.0.4 is installed.
- For specific details, see the Oracle*MetaLink* release note *Integrating Oracle Application Server Personalization with Oracle Marketing*.

##### Steps

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

3. In the Profile field enter AMS : Oracle Personalization Enabled.
4. Click Find.
5. Set to Yes at Site Level.
6. Save your work.

#### 4.2.7.2 Creating Posting Strategy for Oracle Personalization

For OP you will need to create a posting strategy of type Product Recommendation. OP's recommendation strategies look at the posting content type to specify what gets shown when and in what order (if more than one content item can be shown).

The following recommendation strategies are available with this postings:

- Manual Selection
- Product Relationship
- Custom

To create a posting strategy for product recommendation, see the following:

#### Steps

1. Login to Oracle Marketing.
2. Select Execution.
3. Select Web Posting > Create.
4. Fill in the following mandatory fields:
  - Posting Type: Select either *Universal* or *Rule Based*. A universal posting applies the same strategy to all the visitors (although different content may be served up to each visitor). 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.
  - Posting Name: Give the posting a relevant name. For example, Web product 25.
  - Status: Select Active.
  - Content Type: Web Product Recommendation
  - Strategy Type: Oracle Personalization
5. Select **Create**.

### 4.2.7.3 Configuring Oracle Personalization Strategy Details

Use the following procedure to configure details for the Web product recommendation.

#### Steps

1. Login to Oracle Marketing.
2. Navigate to Execution.
3. Select the Web posting that you need to configure.
4. Select Strategy Details.
5. In the Strategy Details page, enter the following:  
Filter Contents By:
  - Exclude Products in the current section: This enables OP to exclude products that are currently being viewed.
  - Include Products in the current sections: This enables OP to include products that are in the current sections.
6. Select **Advanced Options**.
7. In the Products Purchase History section, place a check in the Include Products Previously bought checkbox if you want OP to include previously purchased products in the recommendation. If this checkbox remains unchecked, OP will exclude previously purchased products from the recommendation.
8. In the Context section configure OP to determine the context of the recommendation:
  - Products in the shopping cart
  - Products currently being browsed
  - Users profile and history
  - Best context available
9. In the Base Data section, you can specify tracked data:
  - History Only
  - Current Session Only
  - Both Current Session and History

This flexibility enables you to implicitly limit the scope of recommendations as appropriate. For example, a Web campaign for a video store could want to limit the base data to only the current session data of the renter so that the recommendations returned would most likely be current movies which might have a better margin rather than something related to movies rented a year ago.

10. Select **Apply** to save your work.

#### 4.2.7.4 Creating Media Items Types

For iStore sites, Oracle Marketing pulls images from iStore media items folder (OA\_MEDIA). The content is ultimately coming from iStore, therefore you must setup your media items using iStore.

Once OP returns the product ID, Oracle Marketing:

1. Checks the style for the placement that this posting is using.
2. Determines the media item type needed from iStore.
3. Retrieves the necessary media item type for the product ID returned by OP.

## 4.2.8 Setting Up Campaign Budgets

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

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

- [Section 4.2.8.1, "Setting Up Budget Security"](#)
- [Section 4.2.8.2, "Setting Up Budget Categories"](#)
- [Section 4.2.8.3, "Understanding Budget Status"](#)
- [Section 4.2.8.4, "Setting Up Budget Approval Rules"](#)
- [Section 4.2.8.5, "Setting Up Business Units for Budgets"](#)
- [Section 4.2.8.6, "Setting Up Multiple Currencies for Budgets"](#)
- [Section 4.2.8.7, "Setting Up Budget Requests"](#)
- [Section 4.2.8.8, "Setting Up Budget Reconciliations"](#)
- [Section 4.2.8.9, "Setting Up Budget Roll-up Views"](#)

### 4.2.8.1 Setting Up Budget Security

When a user creates a Budget it is created with:

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

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

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

The table below explains the access security levels for Budgets.

**Table 4–10 Budget Security Levels**

| Security Level | User Name                         | Access Control  |
|----------------|-----------------------------------|---|
| 1              | AMS: Admin Group                  | Updates all fields: <ul style="list-style-type: none"> <li>■ Excluding those locked by system</li> <li>■ Including those locked by locking rules</li> </ul>   |
| 2              | Owner                             | Updates all fields: <ul style="list-style-type: none"> <li>■ Including Owner field</li> <li>■ Including adding Team members</li> <li>■ Excluding those locked by system</li> <li>■ Excluding those locked by locking rules</li> </ul> |
| 4              | Team members without Edit Metrics | View Budget only  |
| 5              | Everyone else                     | No access, no view  |

**Table 4–10 Budget Security Levels (Cont.)**

| Security Level | User Name                         | Access Control  |
|----------------|-----------------------------------|---|
| 3              | Team members with Edit Metrics    | Updates all fields: <ul style="list-style-type: none"> <li>■ Excluding Owner field</li> <li>■ Including adding Team members</li> <li>■ Excluding those locked by system</li> <li>■ Excluding those locked by locking rules</li> </ul> |
| 4              | Team members without Edit Metrics | View Budget only  |
| 5              | Everyone else                     | No access, no view  |

#### 4.2.8.2 Setting Up Budget Categories

Budget Categories serve two purposes:

- **Budget Classification:** Configurable ways to classify a Budget. When classifications are used, Budgets can be divided into sales, marketing, or partnering purposes. For example, if a Budget classification for Partners exists, a category, “Partner Marketing Funds” can be created.
- **Approval Rule Setups:** These rules determine who gets to approve Budgets and under what conditions they can approve them. Approval rules can be either root Budget approval rules or Budget approval rules.

To create Categories for Budgets follow the procedure below:

#### Prerequisites

None

#### Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Category.
3. Select **Create**.
4. Select Created For = Budget.  
Wait for the page to refresh.



5. Enter a Category Name.
6. Select a Parent Category if desired.
7. Select the Enabled checkbox to make the Category available.
8. Optionally enter a description.
9. Provide the following information:
  - Enter an appropriate prefix. These are used as a prefix for the Budget numbers that are generated automatically.
  - Enter valid activities. This is optional. Activities defined here will be used to evaluate Budget eligibility of Campaign Schedules.
10. Select **Create**.

#### 4.2.8.3 Understanding Budget Status

A Budget goes through the following main system statuses:

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

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

**Table 4–11 Budget Statuses**

| Status           | Description  |
|------------------|--|
| Draft            | Budgets in draft status can be updated at any time in any way.<br>Draft status may be updated to Pending Approval or Cancelled.<br>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.<br>After all approvers have responded positively, a Budget may become Active or On Hold.<br>If approvers reject the Budget it will become Rejected.  |

**Table 4–11 Budget Statuses (Cont.)**

| Status    | Description  |
|-----------|--|
| 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.<br><br>At On Hold status, a user can then manually change it to Active or Closed. |
| Rejected  | Budget approvers have rejected the Budget.<br><br>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.<br><br>From Active, the status can be changed to Closed and Cancelled.   |
| Cancelled | Indicates the Budget has been aborted.<br><br>From Cancelled, the status can only be changed to Archived.  |
| Archived  | The Budget can no longer be used.<br><br>This cannot be changed to any other status.   |
| Closed    | From On Hold or Active, Budget status can be manually changed to Closed.<br><br>It indicates that the Budget has ended and is no longer available to fund activities and Offers.   |

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

#### 4.2.8.4 Setting Up Budget Approval Rules

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

Approval rules are evaluated based on the following hierarchy:

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

- Custom Setup = 1

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

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

To set up approval rules use the following procedure:

## Prerequisites

None

## Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Setup > Approval Rule.
3. Select **Create**.
4. Enter the following information:
  - Approval Rule Name: Give a name for your approval rule
  - Start Date: Starting date from which the approval rule will be in use
  - Approval Rule For: Name of person to whom the rule applies.
    - Root Budget Request: Select this if defining the rule for who gets to approve a Budget and under what circumstances.
    - Budget Request: Select this if defining the rule for who gets to approve a marketing objects' request for funding and under what circumstances.
  - Organization: Displays a list of operating units. Select the operating unit for which this approval rule will apply.
  - Budget Category: Select the Budget category that will fall into this approval rule.
  - Setup Type: Custom setups created for Budgets purpose.
  - Minimum Amount and Maximum Amount: Define the range of Budget amounts or Budget request amounts that will fall into this approval rule.
  - Description: Optionally describe your approval rule.
5. Select **Create**.

The Approval Rules details page opens. It displays an Approvers table. This table enables you to define the people who will be approving the Budget:

6. In the Approvers section enter the following information:
  - Order: Enter any integer in ascending order.
  - Type: This can be Function (for customization purpose), Role (defined for marketing and assigned to Resources), or User (a user type).
  - User/Role: Depending on the Type selected above, this may display a list of functions, roles or users
  - Start Date: The date starting from which the approver is active. Within the range of the approval rule, each line can also have a start date and end date.
  - End Date: The date when the approver stops being the approver.
7. Select **Update** to save your work.

#### **4.2.8.5 Setting Up Business Units for Budgets**

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

#### **Prerequisites**

None

#### **Steps**

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

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

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

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

#### 4.2.8.6 Setting Up Multiple Currencies for Budgets

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

Users can transfer Budgets and request money from Budgets in any currency. It is not required that the Budgets sourcing these requests is in the same currency. When a request for money is made in one currency, the user will see the approval notification and money transfer in that same currency. Similarly when Budget Owner receives a request, the system will automatically convert the requested amount into the currency of the Budget. The Budget owner will then approve the amount in Budgets currency.

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

#### Prerequisites

The user exists in the system

#### Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Profile > System.
3. In the Application block type Oracle Marketing.
4. In the User block type the name of the user for which the default currency is being selected.
5. In the Profile block type %JTF%PROFILE%.
6. Select Find.
7. In the User column, change the default currency.
8. Save your work.
9. Log in to Oracle Marketing using the user name previously created.
10. Click the Profile icon.
11. Navigate to Personalization > Display Preferences.
12. Verify that the currency preference is correct.

#### 4.2.8.7 Setting Up Budget Requests

To access Budget Request screen, the proper security access level for the users must be enabled. For more information see [Section 4.2.8.1, "Setting Up Budget Security"](#)

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

#### 4.2.8.8 Setting Up Budget Reconciliations

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

Budget Reconciliation Security is based on:

- Custom Setups: Enables or disables the Reconcile button to exists on the Budget side navigation menu.
- Responsibility: User responsibility levels enables or disables access to the Budget side navigation menu (regardless of Custom Setup). This can be controlled by including or excluding a function during responsibility setup.
- Including or excluding the Responsibility for Reconcile: Whether a user's responsibility allows him to access the Reconcile button inside the Budget side navigation menu (regardless of the above function) can be controlled by including or excluding another function just for the Reconcile portion. This is controlled during responsibility setup.
- Offer Start and End Date: The Reconcile button will only appear if the Offer's end date has been reached and status is completed, or if Offer has no end date its status should be completed.

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

#### 4.2.8.9 Setting Up Budget Roll-up Views

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

This features gives an organization a high level view of all Budget balances summed up to each level. Activities and usages can be viewed by drilling down

into different numbers such as committed and utilized portions of the Budget. When drilled down from a Rollup View, the details will show for the Budget itself and all of its child Budgets.

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

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

### Prerequisites

None

### Steps

1. Log in to Oracle Forms with System Administrator Responsibility.
2. Set the profile AMS: Universal Currency at the site level.
3. For each user, set the JTF\_PROFILE\_DEFAULT\_CURRENCY at user level.  
This determines what currency a user will see in the Budget Rollup View.
4. Log in to Oracle Marketing.
5. Navigate to the Budget tab.
6. Select Rollup View.
  - Self View will show all amounts for the Budget, whereas Rollup View will show all amounts summed for the Budget itself and all Budgets underneath it.
  - The Rollup View converts all Budgets to the profile currency as set up above. Because the profile is set at user level, different users will see the Rollup View accordingly.

## 4.2.9 Setting Up Offers for Campaigns

Offers are generally associated with campaigns and campaign schedules. When Trade Management is implemented, Oracle Marketing’s offer functionality is enhanced to include claims that can be recorded against an offers.

Use the following procedure to set up offers:

- [Section 4.2.9.1, "Setting System Profiles for Offers"](#)
- [Section 4.2.9.2, "Creating and Verifying Lookups for Offers"](#)
- [Section 4.2.9.3, "Running Concurrent Programs for Offers"](#)

## Prerequisites

Advanced Pricing is implemented

### 4.2.9.1 Setting System Profiles for Offers

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

**Table 4–12 System Profiles for Offers**

| Option                                       | Required | Level | Setting   | Effect/Limitation  |
|--|----------|-------|---|--|
| AMS: Relationship Type for Buying Group      | Yes      | Site  | Any valid relationship type created in TCA                              | Used to establish a hierarchical group of customers in TCA. For example, if value is set to subsidiaries then all parties who share this relationship will be part of a buying group. These are used as qualification criteria for Offers. |
| AMS : Choose Date Qualifier Regions          | Yes      | Site  | Show All<br>Show Header Dates<br>Show only Date Qualifiers              | This profile is used in the Trade Deal Offer User Interface.<br>Based on the setting, the user may either enter date qualifiers or Header Dates or both.   |
| AMS : Default Bucket for discount rules      | Yes      | Site  | Values from Advanced Pricing Lookup PRICING_GROUP_SEQUENCE              | The value set here will be used as the default value for buckets in the discount rules.  |
| AMS : Default Phase for Line level discounts | Yes      | Site  | Available values are derived from Event phase setup in Advanced Pricing | This value will be used as the default value for phase for all discount rules with a discount level of Line.   |



**Table 4–12 System Profiles for Offers (Cont.)**

| Option   | Required | Level | Setting   | Effect/Limitation  |
|--|----------|-------|---|--|
| AMS : Default Phase for Line Group level discounts | Yes      | Site  | Available values are derived from Event phase setup in Advanced Pricing | This value will be used as the default value for phase for all discount rules with a discount level of Group of Lines.             |
| AMS : Default Phase for Order level discounts      | Yes      | Site  | Available values are derived from Event phase setup in Advanced Pricing | This value will be used as the default value for phase for all discount rules with a discount level of Order.                      |
| AMS : Default value for Print on Invoice Flag      | Yes      | Site  | Yes/No  | Used as a default for all discount rules.  |
| AMS : Default value for Product Preference         | Yes      | Site  | User Defined  | Used as a default for all discount rules.  |
| AMS : Default Offer Formula                        | Optional | Site  | Available pricing formulas in Advanced Pricing                          | This option handles discount rules for product categories when the Unit of Measure is not specified.                               |
| AMS : Default Forecast UOM                         | Required | Site  | Select from a defined UOM   | This value is used to calculate the initial base sales for a Forecast. Users can override this default value on the Forecast page. |
| QP : Accrual UOM Class                             | Yes      | Site  | UOM Classes as set up in Inventory                                      | Used by accrual Offers. All accrual units will fall under this UOM class (for example, frequent flyer miles).                      |

**Table 4–12 System Profiles for Offers (Cont.)**

| Option                            | Required | Level | Setting  | Effect/Limitation   |
|-----------------------------------|----------|-------|--|---|
| QP : Item Validation Organization | Yes      | Resp  | Select from Inventory Organizations as set up in Inventory | Offers can be defined only for those Products which will be available in the specified organization. Required for all Offers.<br><br>Prices may be defined only for those Products which will be available in the specified organization. |
| QP : Source System Code           | Yes      | Resp  | Possible Source Systems that can define Offers             | Offers created using this relationship are tagged with this system source code and will be used to determine update privileges of Offers within the pricing module.   |

#### 4.2.9.2 Creating and Verifying Lookups for Offers

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

**Table 4–13 Lookups for Offers**

| Key                           | Type       | Values                               | Meanings                                   |
|-------------------------------|------------|--------------------------------------|--|
| AMS_OFFER_DEAL_CUSTOMER_TYPES | Extensible | Buyer<br>Customer<br>List<br>Segment | Buyer Group<br>Customer<br>List<br>Segment |
| AMS_LUMPSUM_DISTRIBUTION_TYPE | System     | %<br>Amt<br>Qty                      | Percent<br>Amount<br>Quantity              |
| AMS_OFFER_LUMPSUM_PAYMENT     | System     | Accrue<br>Check                      | Accrue<br>Issue Check                      |
| AMS_OFFER_LUMP_CUST_TYPES     | System     | Buyer<br>Customer                    | Buyer<br>Customer                          |

**Table 4–13 Lookups for Offers (Cont.)**

| Key                        | Type   | Values   | Meanings   |
|----------------------------|--------|--|--|
| AMS_OFFER_STATUS           | System | Active<br>Closed<br>Draft<br>Rejected<br>Closed<br>Pending<br>Pending_Active<br>Archived<br>Cancelled<br>Completed<br>Terminated<br>Onhold | Active<br>Closed<br>Draft<br>Budget Rejected<br>Closed<br>Pending Budget approval<br>Pending Active<br>Archived<br>Cancelled<br>Completed<br>Terminated<br>On hold |
| AMS_OFFER_TYPE             | System | OID<br>Lumpsum<br>Order<br>Accrual<br>Off_Invoice<br>Deal<br>Terms   | Promotional Goods<br>Lump sum<br>Order value<br>Accruals<br>Off Invoice<br>Trade Deal<br>Terms Upgrade   |
| AMS_QP_ARITHMETIC_OPERATOR | System | %<br>Amt<br>Lumpsum<br>Newprice  | Percent<br>Amount<br>Lump sum<br>New Price   |
| AMS_QP_VOLUME_TYPE         | System | Pricing_Attribute10<br>Pricing_Attribute12   | Quantity<br>Amount   |

#### 4.2.9.3 Running Concurrent Programs for Offers

Run the following concurrent programs for offers:

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

- **AMS-TM: Refresh of Base Sales Materialized View:** This program takes data from Order Management and loads it into Oracle Marketing. It loads into the following materialized tables:
  - ams\_base\_sales\_mv
  - ams\_actual\_sales\_mv

---

# Implementing and Administrrating the Campaign Workbench

This topic group describes concepts and procedures related to implementation and administration of Oracle Marketing Campaign Workbench functionality.

Topics include:

- [Section 5.1, "Implementing the Campaign Workbench"](#)
- [Section 5.2, "Administrating the Campaign Workbench"](#)

## 5.1 Implementing the Campaign Workbench

To implement the Campaign Workbench see the following sections:

- [Section 5.1.1, "Setting Up Campaign Workbench Users"](#)
- [Section 5.1.2, "Setting Campaign Workbench Profile Options"](#)
- [Section 5.1.3, "Running Campaign Workbench Concurrent Programs"](#)
- [Section 5.1.4, "Implementing Schedule Execution"](#)
- [Section 5.1.5, "Disabling the Campaign Tab for Campaign Execution"](#)

### 5.1.1 Setting Up Campaign Workbench Users

Depending on job function and related application visibility you will assign your users one or more of the following responsibilities:

#### **Campaign Workbench User**

Assign this responsibility to the following users:

- **Marketer:** Uses the Campaign Workbench to execute campaign schedules, creates lists, and associates target groups to campaign schedules.
- **Sales Manager:** Uses the Campaign Workbench to create sales activities. A sales activity inherits security definitions, metrics, costs, revenues, and tracking from the campaign it is assigned to.
- **Sales Representative:** Creates and publishes proposal templates (as part of leads follow up). Without this responsibility, a sales representative is unable to publish proposal templates.

#### **Campaign Workbench Super User**

Assign this responsibility to users who perform administrative and setup activities to support schedule creation, maintenance and follow up processes. Additionally, this user creates and maintains schedule templates used by marketers, sales managers, or sales representatives. This responsibility also allows you to create and maintain Web placements used for Web schedule.

---

**Note:** To remove the quick link to the Audience Administration dashboard, you must exclude the specific function AMS\_AUD\_ADMIN\_DASH\_PG (for e.g., from the List Manager/Campaign Workbench responsibility).

To remove the quick link to the Audience Dashboard one must exclude the specific function AMS\_AUDIENCE\_DASH\_PG (for e.g., from the Campaign Workbench responsibility).

---

## 5.1.2 Setting Campaign Workbench Profile Options

Set the following profile options:

**Table 5–1 Campaign Workbench Profile Options**

| Option                                     | Required | Level                               | Effect   |
|--|----------|-------------------------------------|--|
| AMS: Default Campaign Hierarchy Time Range | No       | User<br>Site (default value is 180) | <p>Captures default time range for campaigns shown in the Hgrid.</p> <p>The campaign hybrid enables a user to view the campaign hierarchy. To minimize the number of campaigns shown, this profile can be set at user level.</p> <p>For more information about the hybrid see the <i>Oracle Marketing User Guide</i>.</p> <p>The default value (for site) indicates that campaigns having a start date or end date in the last 180 days will be shown in the hgrid.</p> <p>When a personalized view is defined on hgrid (and that personalized view is chosen to be applied) the resulting campaigns and campaign schedules will be limited to 180 days.</p> |

**Table 5–1 Campaign Workbench Profile Options (Cont.)**

| Option                            | Required | Level                     | Effect   |
|-----------------------------------|----------|---------------------------|--|
| AMS: My Recent Objects Time Range | No       | User Site (default is 30) | Used in the My Recent Schedules bin on the Campaign Dashboard.<br><br>Default value indicates (in days) that the search will be restricted to schedules that were updated within the last 30 days.<br><br>If the end user is a frequent user of campaign schedules, a smaller value can be selected. |

5.1.3 Running Campaign Workbench Concurrent Programs

Use the request set **Metrics Background Process** to populate data for:

- Top Performing Campaigns Bin
- Bottom Performing Campaign Bin
- Trend Graph

Schedule this request set to run daily. It has two concurrent programs:

- Refresh the metric: Enter “Yes” in parameter to collect history.
- Populate the denorm table: If “Yes” is entered in parameter the program will be run in incremental mode.

The top and bottom performing bins and trend graph are found in the Campaign Workbench (shown below).



**Figure 5–1 Bottom Performing Bins -- Request Set Update**

**Campaign Effectiveness**

View: Bottom Performing Campaigns Go Personalize

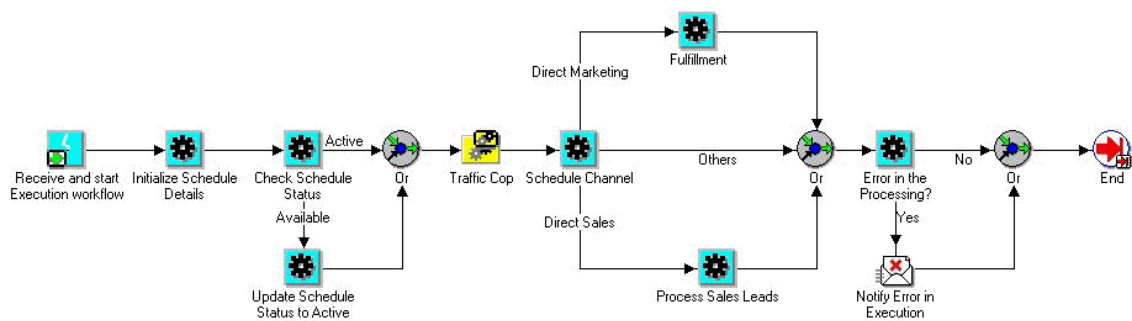
| Details              | *Campaign Name               | Start Date  | End Date    | Leads $\Delta$ | Top Leads Ratio (%) | Lead Acceptance Rate (%) | Leads To Opportunity rate(%) |
|----------------------|------------------------------|-------------|-------------|----------------|---------------------|--------------------------|------------------------------|
| <a href="#">Show</a> | *ARUN-Promote Web Channel    | 01-Jan-2003 | 02-Feb-2004 | 0              | 0.00                | 0.00                     | 0.00                         |
| <a href="#">Show</a> | *Roshni CAMP 0106            | 01-Jan-2004 | 01-Jan-2005 | 0              | 0.00                | 0.00                     | 0.00                         |
| <a href="#">Show</a> | *Chandra's camp              | 07-Jan-2001 | 07-Jan-2005 | 0              | 0.00                | 0.00                     | 0.00                         |
| <a href="#">Show</a> | *DB-TestCamp 11Nov           | 11-Nov-2003 | 11-Nov-2005 | 0              | 0.00                | 0.00                     | 0.00                         |
| <a href="#">Show</a> | *Repeating Schedule Campaign | 30-Sep-2002 | 30-Sep-2005 | 0              | 0.00                | 0.00                     | 0.00                         |

### 5.1.4 Implementing Schedule Execution

The following workflow business event is seeded for schedule execution:

- oracle.apps.ams.campaign.ExecuteSchedule

This business event kicks off the execution process for schedules.

**Figure 5–2 Schedule Execution workflow**

### 5.1.5 Disabling the Campaign Tab for Campaign Execution

Campaign Workbench functionality is packaged as a separate responsibility. If the business decision is made to exclusively use the Campaign Workbench for campaign execution you must create responsibilities to include Campaign Workbench functions packaged in the Campaign Workbench Super User Responsibility (or use default seeded responsibility).

You must also create user accounts that provide access to the Campaign Workbench and Campaign Workbench administration functions. This ensures that the marketing users with responsibilities to access the Campaign Workbench can access it for campaign execution.

To prevent the use of Campaign tab for campaign execution use the following procedure:

1. Exclude the following function:
  - User Name: OMO Campaign Schedules
  - Function name “AMS\_CAMP\_CSCH”) associated with the Campaign Schedules functionality, from the responsibilities associated with the Campaign tab.

Because Campaigns and Programs can only be created in Campaigns and Programs tabs respectively, for planning and budgeting purposes, some users must have access to these two tabs.
2. To remove Campaign Schedules from QuickFind, use the following procedure:
  - a. Login to the jtflogin.jsp page with sysadmin responsibility.
  - b. Navigate to Settings > System > Properties > Advanced
  - c. Choose AMS from the Applications drop-down
  - d. Remove the following properties:
    - service.oracle.apps.ams.search.CschSearchFactory.categories
    - service.oracle.apps.ams.search.CschSearchFactory.desc
3. Bounce the Apache server.

## 5.2 Administering the Campaign Workbench

Using Campaign Workbench administration functionality, you will perform a variety of tasks that ultimately make the Campaign Workbench simple and efficient for your end users.

Administrative tasks include:

- [Section 5.2.1, "Administering Schedule Templates"](#)
- [Section 5.2.2, "Administering Activity Purposes"](#)
- [Section 5.2.3, "Administering Fatigue Rules"](#)

- [Section 5.2.4, "Administrating Content in the Campaign Workbench"](#)
- [Section 5.2.5, "Administrating Web Marketing"](#)
- [Section 5.2.6, "Web Dynamic Recommendations using Oracle Personalization \(OP\)"](#)
- [Section 5.2.7, "Administrating Scripts"](#)
- [Section 5.2.8, "Frequently Asked Questions: Campaign Workbench vs. Campaign Tab"](#)

## 5.2.1 Administrating Schedule Templates

When a marketer creates a campaign schedule a schedule template must be selected. This template provides a prebuilt framework for the end user that enables them to quickly and accurately create schedules. Oracle Marketing ships with one seeded schedule template for each outbound channel.

Schedule templates include commonly used schedule attributes and details including:

- Channel: Includes one or more schedule template and collateral types.
- Schedule Purpose: Seeded with the application and include: cross sell, up sell, customer retention, customer acquisition, and lead maturation.
- List Templates: Associated with schedule purposes and used to create target groups for a schedule. Audience segments are created with either the default list template or a specified one.
- Schedule Planning Requirements: Attributes required for planning a schedule and different channels need different attributes defined. For example, outbound content and the target group must be defined for an e-mail schedule.
- Approval: An attribute indicating that a campaign schedule needs approval. Campaign Schedules based on seeded schedule templates must be approved.

As the administrator, you can create *customized* schedule templates to suit your specific business needs. A customized schedule template is an extension of a seeded template. As such, a customized templates inherits the following:

- Channel
- Schedule purposes
- Default list template associations (from the seeded templates)

The following templates are seeded:

- **Sales:** Used by a sales manager to create a campaign schedule that generates leads that are followed up by the sales team. When your end user create a sales schedule, they will choose *Sales Template* from the template drop-down menu. For more information about the seeded attributes for this template, see [Table 5–2, "Seeded Sales Schedule Templates"](#).
- **Direct Marketing:** Used by the marker to create email, fax, or print campaign schedules. When the end user creates a direct marketing schedule they will choose either *Email, Fax, or Print* from the template drop-down menu. For more information about the seeded attributes for this template, see [Table 5–3, "Seeded Direct Marketing Schedule Templates"](#).
- **Web Advertisement:** Used by the marketer to create campaign schedules for Internet advertisements. This type of template assists the marketing team in creating Web ads that improve product brand, company awareness, or to alert a customer of new and upcoming products or deals. For more information about the seeded attributes for this template see [Table 5–4, "Seeded Web Advertisement Schedule Templates"](#).
- **Telemarketing:** Used by the marketing team to create campaign schedules for call center or telemarketing purposes. For more information about the seeded attributes for this template see [Table 5–5, "Seeded Telemarketing Schedule Template"](#).
- **Web Offer:** Used by the marketer to create campaigns schedules for Internet promotions. For more information about the seeded attributes for this template see [Table 5–6, "Seeded Web Offer Schedule Template"](#).
- **Web Dynamic Recommendation:** Used by the marketer to create a schedule for Web product recommendations. Product recommendations can be based on product relationships or personalized for the customers based on customer data captured by Oracle Personalization. For more information about the seeded attributes for this type of template see [Table 5–7, "Seeded Web Dynamic Recommendation Schedule Template"](#).

**Table 5–2 Seeded Sales Schedule Templates**

| Attribute                                    | Seeded Value   |
|--|--|
| Outbound Channel                             | Sales  |
| Activity Purposes                            | Cross-sell, Up-sell                                  |
| Default List Templates (by activity purpose) | All list templates associated cross sell and up sell |

**Table 5–2 Seeded Sales Schedule Templates (Cont.)**

| Attribute             | Seeded Value   |
|-----------------------|--|
| Default List Template | <p>Default List templates for Sales Schedule Template:</p> <ul style="list-style-type: none"> <li>■ Cross-sell: Used to cross-sell to businesses based on existing install base.</li> <li>■ Up-sell: Used to up sell to businesses based on existing install base.</li> </ul> <p>The Default List Templates includes territory as the first mandatory data filter. If desired, the end user may choose another list template that is not based on Territory.</p> |
| Available Mid-tabs    | <p>Required mid-tabs:</p> <ul style="list-style-type: none"> <li>■ Offering (products and offers)</li> <li>■ Target Group (segmentation rules)</li> </ul> <p>Optional mid-tabs:</p> <ul style="list-style-type: none"> <li>■ Collateral, Scripts, Proposal Templates Collaboration:</li> <li>■ Tracking</li> <li>■ Notes</li> </ul>  |
| Fulfillment           | <p>Direct Sales</p> <p>Generates leads for all the list entries. The Leads Channel Selection engine should channel these leads to Direct Sales Channel, and specific Territories if applicable.</p>  |

**Table 5–3 Seeded Direct Marketing Schedule Templates**

| Attribute         | Seeded Value  |
|-------------------|---|
| Outbound Channel  | Email, Fax, Print   |
| Activity Purposes | Cross- Sell, Up-Sell, Customer Retention, Customer Acquisition, Lead Maturation |

**Table 5–3 Seeded Direct Marketing Schedule Templates (Cont.)**

| Attribute                                    | Seeded Value  |
|--|---|
| Default List Templates (by activity purpose) | <p>Default List templates for Direct Marketing:</p> <ul style="list-style-type: none"> <li>■ Cross-sell: Used to cross-sell to businesses based on existing install base.</li> <li>■ Up-sell: Used to up sell to businesses based on existing install base.</li> <li>■ Customer Retention: Includes, default based on customer data source.</li> <li>■ Customer Acquisition: Includes default sample third party data source.</li> <li>■ Lead Maturation: Mature Leads based on low grade Leads.</li> </ul> |
| Available Mid-tabs                           | <p>Required Mid-tabs:</p> <ul style="list-style-type: none"> <li>■ Offering</li> <li>■ Target Group</li> <li>■ Outbound Collateral</li> </ul> <p>Optional Mid-tabs:</p> <ul style="list-style-type: none"> <li>■ Supporting Collateral, and Scripts, for Collaboration</li> <li>■ Tracking (Includes Costs, Revenues and Metrics)</li> <li>■ Notes</li> </ul>   |
| Fulfillment                                  | Associated Outbound Channel (email, fax, print)   |

**Table 5–4 Seeded Web Advertisement Schedule Templates**

| Attribute                                    | Seeded Value   |
|--|--|
| Outbound Channel                             | Indirect Marketing Channel, Web  |
| Activity Purposes                            | Customer Retention, Customer Acquisition   |
| Default List Templates (by activity purpose) | For all Advertising channels, the user can choose marketing mediums at the Template level. |
| Default List Template                        | N/A  |

**Table 5–4 Seeded Web Advertisement Schedule Templates (Cont.)**

| Attribute          | Seeded Value  |
|--------------------|---|
| Available Mid-tabs | <p>Required Mid-tabs</p> <ul style="list-style-type: none"> <li>■ Offering</li> <li>■ Collateral</li> </ul> <p>Optional Mid-tabs</p> <ul style="list-style-type: none"> <li>■ Target Group: Although optional, there could be an intended audience for Advertisement and Web</li> <li>■ Supporting Collateral, and Scripts for Collaboration:</li> <li>■ Tracking</li> <li>■ Notes</li> </ul> |
| Fulfillment        | Associated Indirect Marketing Channel. For Web, the eMerchandising Engine handles fulfillment.  |

**Table 5–5 Seeded Telemarketing Schedule Template**

| Attribute                                    | Seeded Value  |
|--|---|
| Outbound Channel                             | Direct Marketing  |
| Activity Purposes                            | Cross-sell, Up-sell, Customer Acquisition, Customer Retention, Lead Maturation  |
| Default List Templates (by activity purpose) | <p>Default List templates for Direct Marketing:</p> <ul style="list-style-type: none"> <li>■ Cross-sell: Used to cross-sell to businesses based on existing install base.</li> <li>■ Up-sell: Used to up sell to businesses based on existing install base.</li> <li>■ Customer Retention: Includes, default based on customer data source.</li> <li>■ Customer Acquisition: Includes default sample third party data source.</li> <li>■ Lead Maturation: Mature Leads based on low grade Leads.</li> </ul> |
| Default List Template                        | N/A   |

**Table 5–5 Seeded Telemarketing Schedule Template (Cont.)**

| Attribute          | Seeded Value  |
|--------------------|---|
| Available Mid-tabs | <ul style="list-style-type: none"> <li>■ Offering</li> <li>■ Collateral</li> <li>■ Target Accounts</li> <li>■ Collaboration</li> <li>■ Tracking</li> <li>■ Notes</li> <li>■ Additional Information</li> </ul> |
| Fulfillment        | Associated Outbound Channel   |

**Table 5–6 Seeded Web Offer Schedule Template**

| Attribute             | Seeded Value  |
|-----------------------|---|
| Outbound Channel      | Web Marketing   |
| Activity Purposes     | Cross-sell, Up-sell, Customer Acquisition, Customer Retention, Lead Maturation  |
| Default List Template | N/A   |
| Available Mid-tabs    | <ul style="list-style-type: none"> <li>■ Offering</li> <li>■ Web Planner</li> <li>■ Target Accounts</li> <li>■ Tracking</li> <li>■ Notes</li> <li>■ Additional Information</li> </ul> |
| Fulfillment           | Associated Outbound Channel   |

**Table 5–7 Seeded Web Dynamic Recommendation Schedule Template**

| Attribute             | Seeded Value   |
|-----------------------|--|
| Outbound Channel      | Web Marketing  |
| Activity Purposes     | Cross-sell, Up-sell, Customer Acquisition, Customer Retention, Lead Maturation |
| Default List Template | N/A  |



**Table 5–7 Seeded Web Dynamic Recommendation Schedule Template (Cont.)**

| Attribute          | Seeded Value  |
|--------------------|---|
| Available Mid-tabs | <ul style="list-style-type: none"> <li>■ Offering</li> <li>■ Web Planner</li> <li>■ Target Accounts</li> <li>■ Tracking</li> <li>■ Notes</li> <li>■ Additional Information</li> </ul> |
| Fulfillment        | Associated Outbound Channel   |

### 5.2.1.1 Creating Custom Schedule Templates

If the seeded schedule templates do not meet your business requirements you can create your own. A custom template inherits all seeded base template associations including the outbound channel, sub-tabs, bins allowed, possible activity purposes and default list template for each activity purpose.

To create a custom schedule template use the following procedure:

#### Prerequisites

None

#### Steps

1. Login as a user that has the Campaign Workbench Super User responsibility.
2. Select Campaign Dashboard.
3. Using the Administration shortcut, select Schedule Templates.
4. In the Schedule Template page, select **Create**.
5. Enter the following details:
  - Name: Enter a name for the schedule template. This is the name the user select when choosing a template, therefore it should be intuitive and relevant.
  - Activity Type: Choose an activity type. The values in the Activity type drop-down menu are seeded, if necessary, they can be extended.
  - Activity: Select an activity (or channel) to further describe the activity type.

- Activity Purpose: Select an activity purpose for this template. The values in the Activity Purpose drop-down are seeded and can be extended if necessary. For more information, see [Section 5.2.2, "Administrating Activity Purposes"](#).
- Default List Template: If the activity type is Direct Marketing or Web Marketing, you will see an option to select a default list template.
  - For Direct Marketing, selecting a list template is *mandatory*.
  - For Web Marketing, selecting a list template is *optional*.

The list templates displayed in the Default List Template drop-down are the templates created in the Audience Administration Dashboard.

6. In the Components table, select the mid-tabs that will be displayed to the end user when creating this schedule template.

For example, if Main, Collateral, Offering, Target Group, and Collaboration are checked then the end user will see these mid-tabs when creating this type of schedule.

7. Select Update to save your work.

## 5.2.2 Administrating Activity Purposes

Campaign Schedules are created for specific reasons to achieve a specific objectives. To categorize marketing objectives (also referred to as objective driven marketing), schedules are grouped by *activity purpose*.

All campaign schedules require an activity purpose. In some cases, activity purpose may dictate that a target group is selected. For example, campaign schedules created for cross-sell purposes, requires a target group (consisting of existing customers) to be selected.

Every seeded schedule template contains associated seeded activity purposes. For a complete list of seeded purposes by schedule type see [Section 5.2.1, "Administrating Schedule Templates"](#).

If the seeded activity purposes do not match your business requirements, you can extend them. For example, if you need to view order details for customers who have recently purchased products, you can create a custom activity purpose to meet this objective.

To create a custom activity purpose, extend the user lookup **AMS\_ACTIVITY\_PURPOSES**. See [Appendix B, "Oracle Marketing Lookup Reference"](#) for more information.

## 5.2.3 Administrating Fatigue Rules

Fatigue rules provide your end users with a tool that helps prevent them from over contacting customers. As the administrator, you will setup up fatigue rules that define contact parameters.

Fatigue rules provide the following business benefits:

- Promote Brand Awareness: If promotions are strategically timed, customers are not overexposed, therefore when they are contacted they are likely to be more receptive.
- Support Marketing Strategy decisions: Helps enforce marketing rules dictating customer contact boundaries.
- Maximize Marketing Dollar Effectiveness: If strategically contacting customers, every marketing dollar spent receives (in theory) a better response rate, therefore improving effectivity.
- Improve Collaboration: Enables you to setup enterprise wide rules. For example, Telesales, direct mail, and email (all communication channels having the potential to fatigue the consumer) - by centralizing the rules, you can prevent all channels from over-contacting the consumer.

### 5.2.3.1 Understanding Fatigue Rules and Time Periods

A fatigue rule defines maximum permissible contacts within a specified time period. For example, "Do not contact customers more than two times per month by any channel." The defined time period adheres to a rolling period.

#### Rolling Period Example

An e-mail schedule is set to execute on February 13th and Amy is on the target list of customers to be contacted. The fatigue rule specifies, "Do not contact customers more than two times per month by any channel."

On 13th February (when the schedule executes) it determines how many times Amy has been contacted in the last one month.

Contact count for Amy in the last 30 days:

- Email was sent to Amy on Jan. 15 -- one contact was counted.
- Another email was sent to Amy on Jan. 21 -- the count became two.
- As of Feb. 13, Amy had already reached her threshold of "two contacts per month." Therefore, she is *fatigued* and can't be contacted.

However, if the schedule executed on Feb. 14th, the total number of contacts within the last 30 days would have been 1. The contact on Jan. 15th would have been rolled out from the past 30-day period starting Feb. 14th.

Fatigue rule time periods are defined as follows:

- Week = 7 days
- Month = 30 days
- Quarter = 90 days
- Year = 365 days

### 5.2.3.2 Creating Global Fatigue Rules

Using this type of rule (threshold) you can set an absolute limit on the number of contacts for a given time period.

- If exclusively setting channel-specific limits -- global rules can be null
- For example: do not contact any customer more than 4 times per month by any channel

To create a global fatigue rule, use the following procedure:

#### Steps

1. Login as a user that has the Audience Super User responsibility.
2. Navigate to Administration > Fatigue Rules Setup.
3. In the Global Rules region enter the following details:
  - Global Contact Limit Field: Enter a number to set an absolute limit to the number of contacts that can be initiated by the Marketing department to the customer – for a given time period.  
  
For example, if you do not want to contact a customer more than 2 times per month, enter **2** in this field.
  - Global Limit Drop-Down Menu: Use this drop-down menu to choose a time period for the numerical limit selected above.  
  
For example, if you do not want to contact a customer more than 2 times per month, select **Per Month**.
4. Select **Save**.

In addition to setting global limits, you can define further restrictions by selecting a marketing channel. If channel-specific rules are not set, then there is no limit per channel (within the defined global contact limit.)

### 5.2.3.3 Creating Channel-Specific Rules

Within the limits set globally, you can also establish specific rules (thresholds) for each outbound channel.

- Includes all direct marketing channels: direct mail (print), email, fax, and telemarketing (phone)
- For example: of the 4 total contacts allowed per month, do not contact customer by phone more than 2 times per month.

When determining which rule to use (global vs. channel) the system will always use the most restrictive combination.

For Example, if you have a global rule (do not contact more than 4 times per month) and a channel specific rule (do not contact more than 2 times per month by email or fax) -- in this example, the system will first look at the channel contact limit. If further restrictions are needed, then the global rules would apply. In other words, if both global and channel specific rules are established, the most restrictive combination is used.

To create channel specific rules, use the following procedure:

#### Steps

1. Login as a user that has the Audience Super User responsibility.
2. Navigate to Administration > Fatigue Rules Setup.
3. In the Restrictions by Channel region enter the following details:
  - Channel: Using the drop-down menu, select a channel for the fatigue rule. The channel selected here will, by default, always use the fatigue rule created. For example, if creating a fatigue rule for the “email” channel, select **email**.
  - Maximum Contact: Enter a maximum contact limit for the selected channel. For example, if creating a rule that states you can only contact a customer 2 times per month (by email), enter **2** in this field.
  - Time Frame: Select a time frame (per week, month, year, quarter) for the fatigue rule. For example, if creating a rule that states you can only contact a customer 2 times per month by email, then select **per month**.

- 4. Select **Apply**.

5.2.3.4 Running Fatigue Rule Concurrent Program

When executing a campaign schedule (containing a fatigue rule) the following concurrent program must be running in the background. This program must be scheduled and should simultaneously with schedule executions.

- **AMS: Apply Fatigue Rules**

5.2.4 Administrating Content in the Campaign Workbench

Using the Campaign Workbench, marketers can author, manage, and fulfill content. To accomplish this, Oracle Marketing integrates with Oracle Content Manager (OCM).

As the administrator it is important that you understand the various definitions associated with content.

Table 5–8 Content in the Campaign Workbench: Definitions

| Content Name  | Definition   |
|---------------|--|
| Content Group | A collection of content types that have been defined in the system. Content Groups are a powerful tool that help ensure content consistency and meta-data. Content Groups can be used to bundle up a set of content types that can be used to create content items. Examples of content type groups are: <i>Web marketing</i> and <i>sales initiatives</i> .   |
| Content Type  | <p>A logical set of attributes, attachments, and associations. Refers to data of a certain content type. Examples of content types include a feature article, product information, help files, etc. Content Types should not to be confused with file types like file, URL, PPT, etc. Instead, they are defined as types like images, white papers, or sales presentations.</p> <p>OCM provides some seeded content types on installation. The seeded content types can be modified for Collateral content types and content items.</p> <p>For example, if a feature article is a content type, then the specific article titled “selecting the right database for your company” is the content item.</p> <p>Some Content Items are seeded. For example, stylesheets are seeded for Oracle Marketing. Therefore, OCM provide these on installation and the content items cannot be modified.</p> |

**Table 5–8 Content in the Campaign Workbench: Definitions (Cont.)**

| Content Name | Definition   |
|--------------|--|
| Stylesheet   | Stylesheets are associated with content types. Stylesheets tell the rendering engines how to display the content item to the calling application. Each content type may have many stylesheets associated to it. You can create many different stylesheets, but only one can be the default stylesheet for a specific content type. |

Refer to [Section 3.2.4, "Implementing Fulfillment for Oracle Marketing"](#) for information on cover letters, fulfillment queries, and content in Oracle Marketing.

## 5.2.5 Administrating Web Marketing

Although Oracle Marketing has two different Web marketing strategies (eMerchandising and Web marketing), Web marketing is the only strategy available in the Campaign Workbench.

As the administrator you are responsible for determining what schedule to run, in what order they will run, what content is rendered, and what happens when the rendered content is clicked.

When administrating Web schedules you will perform the following tasks:

- **Specify Content Type:** Before creating a Web placement you will select content types for it. Content types define what content is rendered for a specified Web placement. For details, see [Section 5.2.5.1, "Specifying Content Types for Web Marketing"](#).
- **Create Placement:** Placements are areas on a Web page designated to show marketing content. For details see:
  - [Section 5.2.5.2, "Creating Web Placements"](#)
  - [Section 5.2.5.3, "Determining Exact or Non-Exact Placement Matching"](#)
- **Enable Target Web site:** When an affiliate Web site is implemented you must enable the target Web site. After doing so, you are able to specify placement parameters specifically for that site.
- **Create Web Schedule (Associate Placement and Content):** After associating the content to a placement you will create a Web schedule. As the administrator, you will create Web schedule templates for the end user. For details see [Section 5.2.5.4, "Creating Web Schedule Templates"](#).

- **Create Guest User Account:** If using iStore for your Web content, you will need to create a guest user account (with the appropriate responsibility) to view your placements.

### 5.2.5.1 Specifying Content Types for Web Marketing

Oracle Marketing integrates with Oracle Content Manager (OCM) to provide Web marketing content.

#### **Content Type**

For Web marketing, content is displayed by way of a placement. Placements can have multiple content types associated to it. A specific stylesheet is selected for each content type and associated to a placement. Web Marketing groups content types by Web schedule activities. This acts as a template for Web marketing schedules.

For more information about content types see *Oracle Content Manager User Guide*.

#### **Seeded Content Types for Web Marketing**

Oracle Marketing ships with 2 seeded Web marketing content types:

- **Web Advertisement:** Used for both Web ad and Web offer. The seeded stylesheet for Web is ad is called *Web Ad*. For a schedule of type Web advertisement and Web offer you can create new:
  - Content Types
  - Stylesheets
- **Web Dynamic Recommendation:** The seeded stylesheet for Web Dynamic Recommendation is called *Web Dynamic Recommendation Stylesheet*. For a schedule of type Web dynamic recommendation you can't create new content types. However, you can create new stylesheets.

Unlike a Web advertisement or Web offer, when using Web dynamic recommendations the content rendered is not static therefore cannot be predefined. Recommendations are situational (based on pages browsed, user preference, etc.) therefore, content is dynamically selected. Web dynamic recommendations are only executed when iStore is implemented.

#### **Content Group for Web Marketing**

Content groups are a collection of Content Types defined in the system. For example, a feature article, product information, or help file. Web Marketing content types are part of an overall content group.



The seeded content group for Web marketing is:

- Content Type Group for Web Marketing

The content types that are part of this group will appear in the content type drop-down in the Web planner midtab. Therefore, the user is able to create content items of this content type.

### **Content Items for Web Marketing**

Content items refer to anything a browser can render. For example an image, text file, etc. With the exception of stylesheets, no content items are seeded. Content items should not be created for Web dynamic recommendations because they are dynamically selected and driven by the product recommendations setup through iStore.

### **Stylesheets used in Web Marketing**

Content types are displayed using OCM stylesheets and are ultimately rendered on a placement. A placement can have multiple content types associated to it however, a specific stylesheet can be selected for each content type and associated to a placement. You can create your own style sheets and use with Web marketing. For more information see *Oracle Content Manager Implementation Guide*.

The seeded stylesheets for Web marketing are:

- Universal Web Advertisement Stylesheet
- Web Dynamic Recommendation Stylesheet

#### **5.2.5.2 Creating Web Placements**

Placements are areas on particular Web pages that have been designated to show marketing content. A placement can only be selected once within a schedule. Once the schedule is approved and active (start date has passed, end date has not been reached) the schedule automatically becomes part of the Web schedules that can run on the specified placement (if auto-publish is enabled for that Placement.) If not, the Web site manager will have to go into the placement and explicitly publish the schedule. For more information see [Section 5.2.5.3, "Determining Exact or Non-Exact Placement Matching"](#).

Logical order for Web placement:

1. Placement is picked (exact or non-exact match is determined)
2. A Schedule within the placement is executed - if no schedule is selected, default content (if any) is displayed

3. Content associated to schedule is rendered

### 5.2.5.3 Determining Exact or Non-Exact Placement Matching

To determine where your content is displayed, you must decide if your placement matching is exact or non-exact.

#### Exact Matching

Takes priority over non-exact matching. It uses the following matching priority:

- Application
- Page
- Location
- Site
- Section

#### Non-Exact Matching

Uses the following matching priorities:

- Application
- Page
- Location

**Note:** This is only true for Oracle iStore implementations because of the site and section requirement. Other implementations won't see the site or section parameter (because it is specific to iStore) they will only see page and location.

To create a Web placement, use the following procedure:

#### Steps

1. Login as a user that has the Campaign Workbench Super User responsibility.
2. Within the Administration region, select Web Placements.
3. Click **Create Placement**.
4. In the Create Placement page, you will define parameters for the following:
  - Placement
  - Target

- Content

5. In the Create Placement region, enter the following details:

- Name: Provide a logical name for this placement. Because a single placement can be used by many different schedules - you may want to give it a placement specific name rather than a schedule specific name.
- Description: Provide a short explanation of the nature and purpose of the given Placement.
- Status: To make the placement available for execution, it must be **active**.
- Selection Method: Choose either random or ordered. When the Web schedule executes, this value determines if the placement is displayed randomly on the page, or if it is ordered on the page.
  - When **Ordered** is selected any Web schedule that subsequently chooses this placement will have the lowest schedule display priority in this placement. You will need to go into the Placement to manually change this priority if needed.
  - When **Random** is selected a schedule (assuming it is published) is randomly picked.
- Auto-Publish: Place a check in this checkbox if you want *new* schedules to automatically publish to the Web placement once the schedule is approved.
  - If checked -- a new schedule (that chooses this placement) can execute anytime once it has been approved through the normal schedule process without any further action. This assumes that the placement is already active.
  - If unchecked -- you will need to update the placement and explicitly check this for the new schedule (that picked this placement) to actually run in this placement. You can uncheck the checkbox in the Publish column (even if the schedule is already approved and running.)
  - When publish is unchecked for a schedule, the schedule remains in the list of that placement and is not deleted. Other Placements defined in that Schedule are not affected.

6. In the Target region, enter the following mandatory details:

- Application: Select to specify what application is running the target Web site.

- Oracle Marketing ships with seeded application values (iStore, iSupport, Partners).
- To add additional applications to the drop-down, you will need to add them as a third party application. To do so, you will use the eMerchandising component.
- After adding the affiliate Web site (using eMerchandising), it will be available in the application drop-down.
- Application Seeded values:
  - iStore, iSupport, Partner Portal
  - iSupport Only
- Site: When implementing Web marketing with Oracle iStore, use this section to specify site level details for the placement.
  - A site refers to a specialty store within the context of iStore.
  - For more information see *iStore Implementation and Administration Guide*.
- Section: When implementing Web marketing with Oracle iStore, use this area to specify section level details for the placement. Within an iStore site, various sections exist. For example, for a given site (Vision USA) several sections could exist (Notebooks, PC, Desktops, etc.)
- Page: Specifies the page within the target Web site. This is dependent on the application and/or site specified.
  - Seeded Choices: iStore, iSupport, Partner Portal
  - You can create additional pages for iStore or other defined applications that are currently provided in eMerchandising.
- Location: Specified the location on the tab or page. iSupport only sites use the location left 1 and right 1.

Seeded values:

  - Top
  - Bottom
  - Left (1-7)
  - Middle (1-4)
  - Right (1-4)

7. In the Content Region, enter the following details:
  - Content Type: Using the search icon, select an OCM content type for this placement. Only Web marketing content types are displayed here. The content type determines what content is rendered by the placement.
    - For Web Ads and Web Offers you can create custom content types.
    - For Web Dynamic Recommendations the seeded content type must be used.
    - All Content Types for Web Schedules *must* use the seeded Content Type group.
  - Stylesheet: Using the search icon, select a default stylesheet for this placement. The following Stylesheets are seeded:
    - Universal Web Advertisement Stylesheet (used for Web ad and Web offer)
    - Web Dynamic Recommendation Stylesheet (used for Web product recommendations)
  - Default Content: Use this area to select default content items. In the event that a scheduled is not selected, the content defined here is displayed. You can't create a default click-through destination for a default content item.
  - Default Stylesheet: Use this area to select a default stylesheet for the default content.
8. Select **Save**.

#### 5.2.5.4 Creating Web Schedule Templates

Web Schedules are associated to one or more placements by selecting the placement in the Web planner mid-tab (during the schedule creation process.)

Although all Web schedules use the “Web” channel each type of Web schedule can have specific parameters (and therefore UI's) that are unique to them.

Oracle Marketing ships with three types of seeded Web schedule templates:

- Web Ad: Results in one or more contents (typically image or text) being displayed on a Web page.
- Web Offer: Similar to a Web Ad, but has an offer (in the form of a promo or offer code) associated with content it serves up. One or more offers can be linked to a Web Offer Schedule.

- **Web Dynamic Recommendation:** Results in a product or set of products recommended and the associated product image being rendered on the Web page.
  - There is a seeded content type and style sheets used when a Placement is used for Web Dynamic recommendations. Together, they pull product content from iStore and support the appropriate click through destination action.
  - During the schedule creation process, only Placements with this seeded content type will be visible if the schedule is of type Web Dynamic Recommendation.
  - The seeded style sheets will have layout and click through destination actions associated with it.
  - The two CTD actions are: Go to Item Detail Page, Go to Shopping Cart with Item.

Use the following procedure to create a custom schedule for Web ad and offer. For Web dynamic recommendation, you must use the seeded schedule template.

### Prerequisites

None

### Steps

1. Login as a user that has the Campaign Workbench Super User responsibility.
2. Select Campaign Dashboard.
3. Using the Administration region, select Schedule Templates.
4. In the Schedule Template page, select **Create**.
5. Enter the following details:
  - **Name:** Enter a name for the schedule template. This is the name the user select when choosing a template, therefore it should be intuitive and relevant.
  - **Activity Type:** Choose an activity type. The values in the Activity type drop-down menu are seeded, if necessary, they can be extended.
  - **Activity:** Optionally, select an activity to further describe the activity type.

- Activity Purpose: Select an activity purpose for this template. The values in the Activity Purpose drop-down are seeded, if necessary, they can be extended.
  - Default List Template: For Web Marketing, selecting a list template is *optional*.
6. In the Components table, select the mid-tabs that will be displayed to the end user when creating this schedule template.
  7. Select **Update** to save your work.

## 5.2.6 Web Dynamic Recommendations using Oracle Personalization (OP)

Using Oracle Personalization intelligent/dynamic recommendations are made based on customer browsing, purchase history, and demographic information.

From an administration perspective, you are responsible for:

- [Section 5.2.6.1, "Setting Oracle Personalization Profile Options"](#)
- [Section 5.2.6.2, "Creating Web Placement for OP"](#)
- [Section 5.2.6.3, "Create Web Schedules for OP"](#)

### 5.2.6.1 Setting Oracle Personalization Profile Options

To enable OP for Marketing purposes set the following profile:

**AMS: Use Personalization = Yes**

### 5.2.6.2 Creating Web Placement for OP

Assuming that a Web product recommendation schedule is active, you can create a placement for it. In this process, the placement that you create must have the content type "Web dynamic recommendation".

To create a placement for OP, use the following procedure:

1. Login as a user that has the Campaign Workbench Super User responsibility.
2. Navigate to Administration > Placements.
3. Select **Create Placement**.
4. In the Create Placement region, enter the following details:
  - Name: Provide a logical name for the placement.

- **Description:** Provide a short explanation of the nature and purpose of the given Placement.
  - **Status:** To make the placement available for execution, it must be **active**.
  - **Selection Method:** Choose either random or ordered. When the Web schedule executes, this value determines if the placement is displayed randomly on the page, or if it is ordered on the page.
    - When **Ordered** is selected: any Web schedule that subsequently chooses this placement will have the lowest schedule display priority in this placement. You will need to go into the Placement to manually change this priority if needed.
    - When **Manual** is selected: You can specify which Web schedule in the list will execute *always first* and/or *always last*.
  - **Auto-Publish:** Place a check in this checkbox if you want *new* schedules to automatically publish to the Web placement once the schedule is approved.
    - If checked -- a new schedule (that chooses this placement) can execute anytime once it has been approved through the normal schedule process without any further action. This assumes that the placement is already active.
    - If unchecked -- you will need to update the placement and explicitly check this for the new schedule (that picked this placement) to actually run in this placement. You can uncheck the checkbox in the Publish column (even if the schedule is already approved and running.)
    - When publish is unchecked for a schedule, the schedule remains in the list of that placement and is not deleted. Other Placements defined in that Schedule are not affected.
5. In the Target region, enter the following mandatory details:
- **Application:** Select to specify what is application is running the target Web site.
  - **Site:** When implementing Web marketing with Oracle iStore, use this section to specify site level details for the placement.
  - **Section:** When implementing Web marketing with Oracle iStore, use this area to specify section level details for the placement. Within an iStore site, various sections exist. For example, for a given site (Vision USA) several sections could exist (Notebooks, PC, Desktops, etc.)



- Page: Specifies the page within the target Web site. This is dependent on the application and/or site specified.
- Location: Specified the location on the tab or page.

For more information about parameters in the target region see [Section 5.2.5.2, "Creating Web Placements"](#)

6. In the Content Region, enter the following details:

- Content Type: Choose Web Dynamic Recommendation.
- Stylesheet: Choose Web Dynamic Recommendation Stylesheet (used for Web product recommendations)
- Default Content: Use this area to select default content items. In the event that the selected content can't be rendered, this content will become the default. Even if the placement is associated to iStore location and not the schedule, the default content is displayed.

**Note:** You can't create a default click-through destination for a default content item.

- Default Stylesheet: Use this area to select a default stylesheet for the default content.

For more information about content region parameters see [Section 5.2.5.2, "Creating Web Placements"](#)

7. Select **Save**.

### 5.2.6.3 Create Web Schedules for OP

When creating Web schedules for OP the schedule template must be of type **Web dynamic recommendation**.

To create a schedule template for OP, use the following procedure:

#### Steps

1. Login as a user that has the Campaign Workbench Super User responsibility.
2. Navigate to Administration.
3. Select Schedule Templates.
4. Select **Create**.
5. In the Create Schedule Template page, enter the following details:

- Name: Enter a logical name for the template. For example, Web schedules for OP.
  - Activity Type: In the activity type drop-down menu choose Web Marketing.
  - Channel: Choose Web Dynamic Recommendation.
6. Choose an activity purpose.
  7. Select the applicable components.
  8. Select **Update** to save your work.

**To verify that the OP template is functioning properly:**

1. Navigate to the Campaign Workbench.
2. Using the Create Schedule page enter the following mandatory details:
  - Template: Select the template created for OP (this is the template created previously.)
  - Name: Enter a relevant name for the campaign.
  - Campaign: Search and select for the campaign that this schedule is related to.
  - Launch on: Enter a start date for this campaign schedule.
3. Select **Continue**.
4. Select Web Planner.

## 5.2.7 Administrating Scripts

To administrate scripts in the Campaign Workbench use the following procedure. Refer to Oracle Scripting documentation for details on Oracle Scripting functionality and setups.

### Prerequisites

Oracle Scripting is implemented

### Steps

1. Deploy scripts to the database.
2. Create Survey Deployment.

3. Using the Campaign Workbench, attach the survey deployment as a click-through destination.

For specific procedures see the *Oracle Marketing User Guide*.

4. Execute the schedule.

For specific procedures see the *Oracle Marketing User Guide*.

## 5.2.8 Frequently Asked Questions: Campaign Workbench vs. Campaign Tab

- **Question:** What tools are available to create and execute Campaign Schedules?

**Answer:** The Campaign Workbench is provided in 11.5.10 as a new tool to create and execute campaign schedules. The Workbench is designed to give all users (not just marketers) the ability to create and execute campaign schedules quickly and easily. The Campaign tab provides the same functionality as in 11.5.9 to create and execute campaign schedules for sites that used Oracle Marketing 11.5.9.

- **Question:** What are the benefits of using Campaign Workbench?

**Answer:** The enhanced usability in the Campaign workbench User interface increases operational efficiency for marketers. The Campaign Workbench also supports Sales channel for execution to provide better sales alignment. Sales Schedules allow sales managers to target their own territories with promotional activities as required. Campaign workbench has additional tracking and measuring capabilities for improved marketing measurement.

Campaign Workbench has simplified the Web Schedules to provide the marketers more control on the placements of their content.

- **Question:** Which tool should be used to create and execute Campaign Schedules?

**Answer:** With Campaign workbench, Oracle Marketing has greatly improved the ease-of-use and execution capabilities in the campaign schedule functionality. In the upcoming releases more new features will be added to this tool. Campaign workbench can let users create & execute campaign schedules very efficiently.

However, based on the planning, budgeting and execution requirements for the Campaign Schedules, each site must evaluate the two tools provided for Campaign Schedules setup and execution to choose appropriate tool.

- **Question:** Once a decision is made to use for Campaign tab for Marketing execution, how can that decision be enforced?

**Answer:** Campaign workbench functionality is packaged as a separate responsibility. If the decision has been made to use Campaign tab for campaign execution, the administrator should not create responsibilities to include Campaign Workbench functions packaged in the Campaign Workbench Super User Responsibility. This will ensure that the marketing users have access to Campaign tab alone for campaign execution.

- **Question:** Once a decision is made to use for Campaign Workbench for marketing execution, how can that decision be enforced?

**Answer:** Campaign workbench functionality is packaged as a separate responsibility. If the decision has been made to use Campaign Workbench for campaign execution, the administrator must create responsibilities to include Campaign Workbench functions packaged in the Campaign Workbench Super User Responsibility (or use default seeded responsibility). The administrator must also create User accounts to provide access to Campaign Workbench and Campaign Workbench administration functions as appropriate. This will ensure that the marketing users with responsibilities to access Campaign Workbench can access it for campaign execution.

For more information, see [Section 5.1.5, "Disabling the Campaign Tab for Campaign Execution"](#).

- **Question:** How do I administer the Campaign Workbench?

**Answer:** Campaign workbench administration functions can be accessed from the Campaign Dashboard. An administrator with access to the two functions, Schedule Template and Placements, may access them via the shortcuts on the Campaign Dashboard.

- **Question:** Do I still need perform Administration tasks in the Administration tab?

**Answer:** The Campaigns, Programs, Products, Budgets, and other existing Oracle Marketing functionality needs to be administered, hence it is necessary for the administration to use Administration tab for some setups. Since only the Schedule Templates and Placements administration is included in the Campaign Workbench, some basic Schedule setup such as Marketing Medium setup, Web Sites and Applications Setup, Oracle One-to-One Fulfillment setup, and Leads Processing setup needs to be done by accessing these functions in the Administration Tab.

- **Question:** If a decision is made to use Campaign tab as well as Campaign Workbench for marketing execution, how can that decision be implemented

and what are the consequences on tracking and reporting of campaign schedules?

**Answer:**

- a. Even if it is technically possible to use Campaign tab and Campaign Workbench both for campaign execution, and even if there is no consequence and no impact on execution tracking and reporting, it is recommended to avoid the use of these two tools for campaign execution at the same time due to the following reasons:
- b. The Campaign tab user interface and the Campaign Workbench user interface for campaign schedule setup and execution has different look and feel. To use both at the same time means dual training efforts. If both the tools are used by the same set of users, the usage is error prone.
- c. Due to the considerable difference in the User Interface for Campaign tab and Campaign Workbench, the Campaign Schedules created using Campaign tab can be seen, but cannot be accessed from the Campaign Workbench and vice versa.
- d. Web Marketing Schedules usage and setup differs considerable in both these tools. Web Marketing Implementation in Campaign Workbench has improved usability and better tracking capabilities. If both the tools are used by the same set of users for Web Marketing, the difference is confusing.



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# Implementing and Administrating Audience

This topic group describes concepts and procedures related to the implementation and administration of Oracle Marketing Audience Workbench functionality.

Topics include:

- [Section 6.1, "Implementing Audience"](#)
- [Section 6.2, "Administrating Audience"](#)

## 6.1 Implementing Audience

After installation, perform the following implementation procedures:

- [Section 6.1.1, "Setting Up Audience Users"](#)
- [Section 6.1.2, "Setting Profiles for Lists"](#)
- [Section 6.1.3, "Running List Concurrent Programs"](#)
- [Section 6.1.4, "Verifying Lookups"](#)
- [Section 6.1.5, "Implementing List Import"](#)

### 6.1.1 Setting Up Audience Users

There are two seeded responsibilities for the Audience Workbench: List Manager and Audience Super User. Because menus, navigation and login flows depend on the responsibility of the logged in user, you will assign one or both of the following to your users:

#### **List Manager Responsibility**

Users with this responsibility typically:

- Use the Audience Dashboard as their home page
- Establish and manage the internal list selection process for marketing departments
- Manage lists from affiliates and vendors
- Develop and manage processes for list data quality
- Ensure data enrichment and list data integrity
- Are primarily responsible for list creation and management

#### **Audience Super User Responsibility**

Users with this responsibility typically:

- Perform administrative activities to support list management
- Create and maintain data sources used by the end user to create lists
- Configure query templates
- Maintain suppression lists



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**Note:** To remove the quick link to the Campaign Workbench you must exclude the specific function `AMES_WB_CAMP_DASHBOARD` (for e.g., from List Manager/Audience Super User responsibility).

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## 6.1.2 Setting Profiles for Lists

Set the following profiles for lists. If using Oracle Discoverer for list generation, additional profiles are required. For more information see [Section 2.5.2.6.1, "Setting Discoverer Profile Options"](#).

**Table 6–1 AMS List Profiles**

| Profile Name                     | Required | Level | Setting      | Effect/Limitation  |
|----------------------------------|----------|-------|--------------|--|
| AMS: List Workbook B2C Marketing | Optional | Site  | User Defined | Workbook name convention prefix for B2C workbooks. The default is B2C. A blank convention prefix will result in more workbooks than you need in the LOV. |
| AMS: List Workbook B2B Marketing | Optional | Site  | User Defined | Workbook name convention prefix for B2B workbooks. The default is B2B. A blank convention prefix will result in more workbooks than you need in the LOV. |

## 6.1.3 Running List Concurrent Programs

Run the following concurrent programs as needed.

**Table 6–2    *List Concurrent Programs***

| Concurrent Program  | Required | Description  |
|---|----------|--|
| AMS Migrate Word Replacement Rules for Remote List Processing | Yes      | This program migrates word replacement rules from a local to remote instance.<br><br>This is a scheduled program.  |
| AMS Migrate Remote List                                       | Yes      | This program migrates a list generated in a remote instance to a local instance. This is a scheduled program and can be executed for a particular list or for all lists.     |
| AMS Generate Materialized View for Template                   | Yes      | This program executes when a query template is created (when the Finish button is selected on the query template screen.) It creates the materialized view for the template. |
| AMS Re-Generate Materialized View for All Template            | No       | This program refreshes the materialized views for all templates.   |
| AMS Process to Calculate the List Selection Totals            | Yes      | This program calculates the running totals for an advanced list. This is launched when the recalculate button is selected from the list generation selections page.          |

**6.1.4    Verifying Lookups**

The following lookups populate the list of values for list functionality. If implementing Oracle Discoverer for lists, you will need to verify additional lookups. For more information see [Section 2.5.2.6.2, "Creating and Verifying Discoverer List Lookups"](#).

**Table 6–3 List Lookups**

| Key                       | Type   | Seeded Values  | Meanings  |
|---------------------------|--------|--|---|
| AMS_LIST_ACT_TYPE         | User   | List<br>Import List<br>Workbook<br>Segment<br>SQL                    | Target group selection type.  |
| AMS_LIST_DEDUP_TYPE       | User   | Import Persons<br>Import Organizations                               | Type of Deduplication Rules to be applied.  |
| AMS_LIST_GENERATION_TYPE  | System | Append New Records<br><br>Full Refresh<br><br>Update Attributes Only | New entries added, old entries not deleted, entries not updated.<br><br>All old entries deleted, new entries added.<br><br>Entries are updated  |
| AMS_LIST_ROW_SELECT_TYPE  | System | Nth Record<br>Random<br>Standard                                     | How to select rows during list generation. Standard is top down selection.  |
| AMS_LIST_SEGMENT_STATUS   | User   | Archived<br>Available<br>Cancelled<br>Draft<br>Expired               | Archived<br>Available<br>Cancelled<br>Draft<br>Expired  |
| AMS_LIST_SEGMENT_TYPE     | System | Workbook<br>SQL  | Two types of segments supported. Based on a Discoverer workbook or an SQL statement.  |
| AMS_LIST_SELECTION_ACTION | System | Include<br>Intersect<br>Exclude                                      | How each selection is added to the list. Exclude means that all entries that exist in the excluded list are removed from the current list. Intersect causes the current list to become a list of only those entries which are on the intersected list and the current list. |

**Table 6–3 List Lookups (Cont.)**

| Key                     | Type   | Seeded Values   | Meanings                                   |
|-------------------------|--------|---|--|
| AMS_LIST_SELECT_TYPE    | System | Segment<br>Workbook<br>Import List<br>List<br>SQL   | Components of list used in list selection. |
| AMS_LIST_SEGMENT_STATUS | User   | Archived<br>Available<br>Cancelled<br>Draft<br>Expired  | Possible list segment statuses.            |
| AMS_LIST_STATUS         | System | Archived<br>Available<br>Cancelled<br>Draft<br>Executed<br>Executing<br>Failed<br>Generating<br>Locked<br>Migrating<br>New<br>Pending<br>Reserved | List Statuses                              |
| AMS_CHART_TYPE          | System | Pie<br>Bar<br>Column  | Type of chart available                    |

**Table 6–3 List Lookups (Cont.)**

| Key                           | Type   | Seeded Values   | Meanings  |
|-------------------------------|--------|---|---|
| AMS_QUERY_TEMPLATE_TYPE       | System | Standard<br>Parametrized SQL  | Two types of templates are supported: Standard and Parameterized SQL.<br><br>Standard templates are created using the NLQ (natural language query builder) interface.   |
| AMS_LIST_TYPE                 | System | Manual List<br>Standard List<br>Suppression List<br>Target Group  | List of possible list types. Note where these appear in the program.  |
| AMS_AUDIENCE_METRIC_TYPES     | System | Booked Order Amount<br>Booked Order Count<br>Invoiced Order Amount<br>Leads<br>Opportunities<br>Responses | Metrics that are tracked for Lists used in target groups.   |
| AMS_EXP_N_BUILDER_OPERATORS   | System | Average<br>Maximum<br>Minimum<br>Count<br>Sum<br>Sysdate  | Valid operators for expression builder.   |
| AMS_DATA_SOURCE_LOCATION_TYPE | System | Local<br>Remote   | Data sources are based on tables/views that are located in the current database (local instance) or views/tables located in a remote database (remote instance). The remote instance is accessed using a database link. |

**Table 6–3 List Lookups (Cont.)**

| Key                     | Type   | Seeded Values  | Meanings                         |
|-------------------------|--------|--|----------------------------------|
| AMS_DATASOURCE_TYPE     | System | Parent<br>Child  | Types of data sources available. |
| AMS_DATASOURCE_CATEGORY | System | Organization Contacts<br>Persons                             | Category of data source.         |
| AMS_SPLIT_MODE          | System | Split by Attribute<br>Split by Percentage<br>Split by Number | List splitting methods           |

## 6.1.5 Implementing List Import

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

The following types of lists can be imported:

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

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

To implement List Import see the following sections:

- [Section 6.1.5.1, "List Import Table Overview"](#)
- [Section 6.1.5.2, "Creating the Bin Directory"](#)
- [Section 6.1.5.3, "Setting System Profiles"](#)
- [Section 6.1.5.4, "Verifying Lookups for List Import"](#)
- [Section 6.1.5.5, "Running NFS Mount"](#)

### 6.1.5.1 List Import Table Overview

The Oracle Marketing list import functionality supports many different business requirements. For example, event registration can be automatically executed from list import.

When a list import is performed, B2B or B2C data is imported into the Marketing and TCA tables. When doing so, you can import directly into TCA or you can choose to preview it first.

Marketing import tables:

- AMS\_IMP\_LIST\_HEADERS\_ALL
- AMS\_IMP\_SOURCE\_LINES
- AMS\_PARTY\_SOURCES

TCA import tables:

- HZ\_PARTIES
- HZ\_LOCATIONS
- HZ\_PARTY\_SITES
- HZ\_CONTACT\_POINTS
- HZ\_ORG\_CONTACTS

### 6.1.5.2 Creating the Bin Directory

Use this procedure to create a location for the SQL loader control file. This step enables you to import data from a file located on the server.

#### Prerequisites

SQL Loader is installed

#### Steps

1. Launch a DOS prompt.
2. Create the Bin Directory under PRODUCT TOP (\$AMS\_TOP) for the SQL Loader control file.

This directory must have read, write and execute privileges.

### 6.1.5.3 Setting System Profiles

Set the following list import profile options:

**Table 6–4 List Import Profile Options**

| Option                                  | Required | Level | Setting                  | Effect/Limitation  |
|---|----------|-------|--------------------------|--|
| AMS :<br>IMPORT<br>CONTROL<br>FILE PATH | Yes      | Site  | Control File<br>Location | Enter the path for the bin directory:<br>(\$AMS_TOP/bin/)<br><br>This path is relative to the mid-tier<br>server that the SQL loader control file<br>is written to.<br><br>Improper setup will cause the server<br>side import to fail.  |
| AMS :<br>IMPORT<br>DATA FILE<br>PATH    | Yes      | Site  | Data File<br>Location    | Enter the path for the data file location:<br>(\$AMS_TOP/bin/).<br><br>This path is relative to the mid-tier<br>server and indicates the location of the<br>import data file.<br><br>For the data file you may also set a<br>different path to where the data is kept.<br><br>Improper setup will cause the server<br>side import to fail. |
| AMS : HZ<br>DEDUPE<br>RULE              | Optional | Site  | Yes/No                   | Indicates whether de-duplication rules<br>are used during the TCA import<br>process.<br><br>The system may create duplicate<br>records if this profile is not set to Yes.  |
| AMS :<br>Import<br>Client File<br>Size  | Yes      | Site  | Numeric<br>value         | Size of file in bytes. Based on this<br>profile, the import program decides<br>whether to use the concurrent manager<br>to upload the file.<br><br>Default value is 1000000. For Oracle<br>Marketing List Import functionality,<br>this value sets the file size limit in<br>terms of bytes that can be uploaded by<br>client.             |
| AMS :<br>Default<br>Data Source         | Yes      | Site  | Data Source<br>name      | Data source name that is defaulted in<br>the list/target group creation screens.   |



**Table 6–4 List Import Profile Options (Cont.)**

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

#### 6.1.5.4 Verifying Lookups for List Import

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

**Table 6–5 List Lookups**

| Key               | Type   | Values        | Meanings  |
|-------------------|--------|---------------|---|
| AMS_IMPORT_STATUS | System | New           | New Import  |
|                   |        | Staged        | Entries are imported and available for viewing                    |
|                   |        | Scheduled     | Import is setup and ready to be completed at the scheduled time   |
|                   |        | Completed     | Import completed  |
|                   |        | Purged        | Imported entries have been purged from the Marketing Import Table |
|                   |        | Cancelled     | The List Import has been cancelled and may not be reactivated     |
|                   |        | Error         | An error occurred during List Import                              |
|                   |        | Duplicate     | Duplicate record found  |
|                   |        | Incompdump    | Incomplete-Duplicate found  |
|                   |        | Incompdumperr | Incomplete-Duplicate-Error found                                  |
|                   |        | Incomperr     | Incomplete-Error found  |
| AMS_IMPORT_TYPE   | System | B2B Customer  | Organizations, Contacts, Address                                  |
|                   |        | B2C Customer  | Persons, Addresses  |
|                   |        | Event         | Event Registration  |
|                   |        | Lead          | Leads   |

#### 6.1.5.5 Running NFS Mount

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

## 6.2 Administering Audience

To administrate the Audience Workbench, see the following:

- [Section 6.2.1, "Administering Data Sources"](#)
- [Section 6.2.2, "Creating Remote Data Sources"](#)
- [Section 6.2.3, "Administering Query Templates"](#)
- [Section 6.2.4, "Fatigue Rules and Lists"](#)
- [Section 6.2.5, "Administering Deduplication Rules"](#)
- [Section 6.2.6, "Administering List Import"](#)

### 6.2.1 Administering Data Sources

As the audience administrator, you are responsible for setting up data sources and their respective attributes. Data sources are a fundamental component of the list management process. In short, they determine the type of data retrieved for lists.

Data source determine:

- Attributes available to the end user during list creation
- TCA information mapping (when remote lists are migrated to a local instance)
- Data available in list entry
- Attribute available for splitting and charting
- Deduplication rules

Data sources map columns from a source table (or view) to the marketing list entries table AMS\_LIST\_ENTRIES. Once mapped, data from the table or view can be used for lists.

Data sources can be either child or parent.

## Parent and Child Data Sources

The parent data source determines the type of list that will be created.

Usually, the attributes included in the parent data source are mapped to the list entries. Each parent data source also includes seeded templates and de-duplication rules.

A *child data source* provides additional information about the parent. A parent can have an unlimited number of child data sources associated.

## Parent and Child Data Source Example

**Scenario:** Amy is the list administrator for Vision Computers. Her marketing team wants the ability to generate a list for cross sell purposes. The end goal is to generate a list of customers who have recently purchased a Vision Desktop computer.

**Solution:** Based on the business requirements given to her, Amy must create the appropriate data sources. As such, she will create a parent data source "Persons" and a child data source "Order Detail."

Parent Data Source: Persons

- Table: AMS\_PERSON\_DETAILS\_V
- Unique Identifier: PARTY\_ID
- Information of interest: Person First Name, Person Last Name, Email Addresses, Language
- Note: This data source provides details about the person/customer who has recently purchased a Vision Desktop computer

Child Data Source: Order Detail

- Table: AMS\_DS\_ORDERS\_V
- Unique Identifier: PARTY\_ID
- Information of interest: Booked date, Creation Date, Unit Selling Price, Order ID
- Note: This data source provides transactional information about the person (and customer) who has placed the order

To administrate data sources see:

- [Section 6.2.1.1, "Seeded Data Sources"](#)
- [Section 6.2.1.2, "Related Data Sources"](#)

- [Section 6.2.1.3, "Creating Parent Data Sources for Lists"](#)
- [Section 6.2.1.4, "Creating Child Data Sources"](#)
- [Section 6.2.1.5, "Configuring Data Source Attributes"](#)
- [Section 6.2.1.6, "Defining the List of Values and Charts for Data Sources"](#)
- [Section 6.2.1.7, "Linking a Parent to a Child Data Source"](#)
- [Section 6.2.1.8, "Linking a Child to a Parent Data Source"](#)

### **6.2.1.1 Seeded Data Sources**

The following parent data sources are seeded:

- **Person:** Represents Business to Consumer (B2C) customer attributes such as first name, last name, marital status, household income, etc.
- **Organization Contacts:** Represents Business to Business (B2B) attributes such as first name, last name, job title, work e-mail address, etc.
- **Organization:** Represents organization attributes such as company name, business type, revenue, etc.

See [Appendix F, "Seeded Data Source and Data Source Attribute Reference"](#) for more information on seeded data sources.

### **6.2.1.2 Related Data Sources**

Related Data Sources help define the relationship between the corresponding data source and its related data source. For a parent data source, it displays the relationship with its child data sources. For a child data source it displays the relationship with the parent data source.

The Related Data Sources mid tab is displayed for all data sources (parent or child). If a relationship is defined in the parent data source (between itself and a child data source), then on navigating to the child data source, you see the relationship between the child and the parent. This implies that creating a relationship in one data source, displays the inverse relationship in the "Related Data Sources" mid tab of the other data source.

For example if the Parent Data Source is Organization Contacts and the child data source is Locations, then if a relationship is created between the Organization Contacts and Locations in Organization Contacts, then the Related Data Sources mid-tab of Locations automatically displays the relationship of Locations to Organization Contacts.

The following related data sources are seeded:

- Person Profile
- Education
- Employment History
- Organization Profile
- Account Profile
- Interactions
- Leads
- Order Detail
- Install Base
- Sales Access
- Data mining Aggregates
- Profitability
- System Reference
- Data Mining Score

### **6.2.1.3 Creating Parent Data Sources for Lists**

If the seeded parent data sources do not meet your business requirements you can create your own. When doing so, you can point to the Oracle TCA or you can use data that resides in a remote location. For more information about creating remote data sources, see [Section 6.2.2, "Creating Remote Data Sources"](#).

Whether using the seeded data sources or creating your own, when creating list templates selecting a parent data source is mandatory.

To create a parent data source, use the following procedure:

#### **Prerequisites**

None

#### **Steps**

1. Login as a user that has the Audience Super User responsibility.
2. Select Administration Dashboard.

3. Select Create Data Source.

4. Fill in the following required fields:

- Data Source Name: Enter a logical name for the parent data source. The name must be unique.
- Code: This code is used as a reference for the data source when creating Discoverer Workbooks. For more information about creating Discoverer Workbooks, see [Section 2.5.2.6, "Integrating Oracle Marketing and Oracle Discoverer"](#).
- Type: Choose Parent Data Source.
- Category: Selecting a category enables you to organize the data source by type. Category selection is mandatory when creating parent data sources and optional when creating child data sources.

Categories determine the type of list that the end user will create. This distinction tells the system (for example, Fulfillment, OTS, Advance Outbound) using the list what types of entries is on the list.

The following categories are seeded:

- Organization Contacts
  - Persons
  - Organization
- Table or View Name: Select the appropriate table or view that the data source is using. By selecting a view (given it has been created) you are able to narrow down the amount of data that the end user is able to retrieve when creating lists.
  - Unique Identifier: All data sources require a unique identifier. It can be any attribute defined in the table or view chosen above. The unique identifier enables you to set a default join condition between a parent and child data source. A common unique identifier for the parent data source is the PARTY\_ID.

You can explicitly relate the parent and child during the creation phase or at a later time (using the related data sources mid-tab). If you know your parent and child relationships up front, you can specify the default join condition in the data.

5. Select **Apply**.

The Update Data Source page opens.

6. In the Attributes tab, fill in the necessary information.

For more information about data source attributes, see [Section 6.2.1.5, "Configuring Data Source Attributes"](#).

7. Select **Apply**.

#### 6.2.1.4 Creating Child Data Sources

After creating parent data sources you can create children for them. This enables you to define additional attributes for the parent.

#### Prerequisites

Table or view is created

#### Steps

1. Login as a user that has the Audience Administrator responsibility.
  2. Navigate to Audience Dashboard > Audience Administration.
  3. Select Create Data Source.
  4. Fill in the following required fields:
    - Data Source Name: Enter a logical name for the parent data source.
    - Code: This code is used as a reference for the data source when creating Discoverer Workbooks.
    - Type: Choose Child Data Source.
    - Category: Categories only apply to parent data sources.
    - Table or View Name: Select the appropriate table or view for the child. If your business requirements mandate that you associate this child data source to a parent, enter the parent table or view name here.
    - Unique Identifier: Enables you to set a default join condition between a parent and child data source. Specifying the join condition here enables the child and parent to be *explicitly* joined.

Although you can relate the parent and child at a later time (using the Related Data Sources mid-tab), if you know your parent/child relationships up front, you can join them in the data source creation phase.
  5. Select **Apply**.
- The Update Data Source page opens.

6. In the Attributes tab, fill in the required details.

For more information about data source attributes, see [Section 6.2.1.5, "Configuring Data Source Attributes"](#).

7. Select **Apply**.

### 6.2.1.5 Configuring Data Source Attributes

When creating or updating data sources you will define the attributes for it. Using the data source attribute pages, you can define data source attributes for list management as well as data mining.

**Table 6–6 Data Sources Attributes**

| Attribute Name          | Description   |
|-------------------------|---|
| Attribute               | The attributes of the table or view that the data source references. The values are displayed as they exist in the table or view.   |
| Display Name            | Allows you to change the display name for the attributes pulled from the table or view. The values entered in this column are displayed to the end user during the list creation process.   |
| Map to List Entries     | <p>Use this field to map or organize how this data source is displayed in the list entries screen for the end user.</p> <p>This attribute is important because if you want to enable the user to split the list, chart distribution of data for this attribute, or use this attribute in a dedupe rule then you must map the attribute to list entries.</p> <p>For example, if you want <i>gender</i> to be the first column displayed to the end user, in this column you would enter COL1.</p> <p>Use the Search and Select flashlight to pick from the list of values.</p> |
| Display in List Entries | <p>Use this checkbox to indicate that you want this data source to display data (by default) in the List Entries page for the end user.</p> <p>If this checkbox is left unchecked, the data source will not display by default and the end user will have to explicitly select it through the personalization option.</p>   |
| Use for Split           | <p>The end user has the option to split a list by attribute. Therefore, as the administrator, when defining data source attributes, you must specify that it is available for splitting.</p> <p>If you want to use for splitting you must map the attribute.</p>  |
| Define LOV Chart        | Selecting this icon enables you to define LOV and chart ranges for this data source. If you are charting an attribute, you must also map to list entries.   |



**Table 6–6 Data Sources Attributes (Cont.)**

| Attribute Name | Description   |
|----------------|---|
| LOV            | If a list of values are defined for this attribute, then you will see a check in this column.   |
| Chart          | If a chart is defined for this attribute, then you will see a check in this column.   |
| Enabled        | Place a check in this checkbox to enable the attribute for the data source. If this checkbox is left unchecked, this attribute will not be available for use in the list template creation process. |

### 6.2.1.6 Defining the List of Values and Charts for Data Sources

When defining data source attributes, you can choose to define a list of values that correspond to it. This list of values can also be used to drive the chart ranges. This reduces the chance of error because you are limiting the data the user can select.

To define the LOV and chart attribute use the following procedure:

#### Prerequisites

Data Source is created

#### Steps

1. Login as a user that has the Audience Administrator responsibility.
2. Navigate to Audience Dashboard > Audience Administration.
3. Locate the Data Source you configuring.
4. In the Attributes mid-tab, select the Define, LOV chart icon.
5. In the Add List of Values Using drop-down select one of the following:
  - **Manual Entries:** This option enables you to manually define the LOV for the attribute. If using this option, select “Add Another Row” and enter a value code and display name.
    - **Value code:** Exact value (as it appears in the database). For example, the value code for country could be CAN for Canada.
    - **Display name:** Text box that allows you to change the code name to a more user-friendly display name. For example, the display name for CAN could be Canada.

- Another List of Values: Allows you to pick a specific list of values that have previously been defined for similar attribute. This option allows you to re-use the LOV that has previously been defined. This will save you time. Using this option you essential share the LOV with other attribute, therefore changing the definition of the LOV will affects all attributes sharing this LOV.
  - List of Value Name: Using the search and select window specify the values that you'd like this attribute to have. For example, if you'd like the attribute "COUNTRY" to have "United States" and "Canada" as the list of value options, select them here.
  - Description: Optionally enter a description for this LOV.
- Custom SQL: Using this option, you can define the list of values using data retrieved with SQL logic. Use the Custom SQL box to enter an SQL statement.

6. Select **Apply**.

### 6.2.1.7 Linking a Parent to a Child Data Source

Use the following procedure to establish a parent and child data source relationship.

#### Prerequisites

- Parent is created
- Child is created

#### Steps

1. Login as a user that has the Audience Administrator responsibility.
2. Navigate to Audience Dashboard > Audience Administration.
3. Select the parent data source (this is the parent for the child that you want to link to).
4. Select Related Data Source (mid-tab).
5. Select Add Another Row and enter the following:
  - Related Data Sources: Search and select the child data source.
  - Related Data Sources Column: Search and select the unique identifier for the child data source. This is the child data source attribute that would

define the join condition between the child and the parent. If this column is left blank the child's unique identifier will be used as the join condition.

- **Primary Data Source Column:** Search and select the unique identifier for the child and the parent. By selecting the same unique identifier, the child becomes associated to the parent. If this column is left blank the parent's unique identifier will be used as the join condition.

**Note:** If the parent data source is selected first (and the child is related after) the primary data source columns refers to the parent and the related data source column refers to the child.

If the child data source is selected first (and parent is related after) the primary data source columns refers the child and the related data source column refers to the parent.

## 6. Select **Apply**.

### 6.2.1.8 Linking a Child to a Parent Data Source

To manually establish a relationship between a child and parent data source, use the following procedure.

#### Prerequisites

- Parent is created
- Child is created

#### Steps

1. Login as a user that has the Audience Administrator responsibility.
2. Navigate to Audience Dashboard > Audience Administration.
3. Select the child data source (this is the child for the parent that you want to link to).
4. Select Related Data Source (mid-tab).
5. Select Add Another Row and enter the following:
  - **Related Data Sources:** Search and select the child data source.
  - **Related Data Sources Column:** Search and select the unique identifier for the parent data source. This is the parent data source attribute that would define the join condition between the child and the parent. If this column is left blank the parent's unique identifier will be used as the join condition.

- **Primary Data Source Column:** Search and select the unique identifier for the child and the parent. By selecting the same unique identifier, the child becomes associated to the parent.

**Note:** If the parent data source is selected first (and the child is related after) the primary data source columns refers to the parent and the related data source column refers to the child.

If the child data source is selected first (and parent is related after) the primary data source columns refers the child and the related data source column refers to the parent.

6. Select **Apply**.

## 6.2.2 Creating Remote Data Sources

Data sources can be local or remote. Remote data sources can be setup and used for list generation. Remote data sources point to objects residing in a remote instance. For example, an external data warehouse system. To define a remote data source, you will point to a remote object using a database link (db link).

A list created by the end user using a remote data source will reside in the remote instance until it is migrated.

Optionally, once you have established the db link, you can migrate a single list (or all remote lists) to your local instance. If migrating, remote lists go through a migration process. For target group generation, data validation and TCA inserts are performed. List are generated through a package available on the remote instance.

Use the following procedures to setup the remote data sources:

- [Section 6.2.2.1, "Running a Script to Setup Schema in a Remote Database"](#)
- [Section 6.2.2.2, "Creating the Database Link in the Local Instance"](#)
- [Section 6.2.2.3, "Create Remote Data Sources in the Audience Administration Dashboard"](#)

### 6.2.2.1 Running a Script to Setup Schema in a Remote Database

Use the following steps to create schema used for remote processing.

#### Steps

1. Login to SQL\*Plus in the remote database.

---

**Note:** As a best practice, you should create a new schema and give access to tables and views which will be used for remote data processing. Typically this would be views and tables that will store customer information with which you are going to create lists. By creating new schema, you are limiting apps user access to only the relevant tables and views which might be needed for list generation.

---

2. Download the zip file `amsrlpkg.zip` and unzip the contents.
3. Run the script `amsremot.sql` on the remote database (for the same schema). This script creates the following tables:
  - `AMS_LIST_ENTRIES`
  - `AMS_HZ_WORD_REPLACEMENTS`
  - `AMS_LIST_HEADERS_ALL`
  - `AMS_LIST_SELECT_ACTIONS`
4. Apply the following AMS .pls files :
  - `amslgrms.pls`
  - `amslgrmb.pls`

#### 6.2.2.2 Creating the Database Link in the Local Instance

Use the following guidelines when creating the DB link in the local instance:

- `DBLINK_FROM_LOCAL_TO_REMOTE`: Database link name
- Username: Username used to connect to remote instance
- Password: Password used to connect to remote instance
- `REMOTE_DATABASE_NAME`: Name of remote instance

#### Steps

1. To create the DB link in the local instance:

```
CREATE PUBLIC DATABASE LINK DBLINK_FROM_LOCAL_TO_REMOTE
CONNECT TO USERNAME IDENTIFIED BY PASSWORD
USING REMOTE_DATABASE_NAME;
```

### 6.2.2.3 Create Remote Data Sources in the Audience Administration Dashboard

After running the script and creating the remote database link you are now ready to create a data source using data in the remote instance. Therefore, when creating a new data source, the remote data will be available to you.

To create a data source (using the remote data) use the following procedure.

#### Steps

1. Login as a user that has the Audience Workbench Super User responsibility.
2. Navigate to the Audience Administration Dashboard.
3. Select Create Data Source.
4. In the Create Data Source Page, enter the following:
  - Data Source Name: Enter a logical name for the data source.
  - Code: This code is used as a reference for the data source when creating Discoverer Workbooks.
  - Type: Choose either parent or child.
  - Category: If applicable, choose a category. Categories only apply to parent data sources.
5. In the Table or View Information region, enter the following:
  - Location: Choose Remote.
  - Database Link: Enter the database link information. This is the link created in [Section 6.2.2.2, "Creating the Database Link in the Local Instance"](#).
  - Table or View Name: Select the appropriate table or view that the data source points to. By selecting a view (given that a view has been created) you are able to narrow down the amount of data retrieved by this data source.
  - Unique Identifier: Enables you to set a default join condition between a parent and child data source. Specifying the join condition here enables the child and parent to be *explicitly* joined. Although you can relate the parent and child at a later time (using the Related Data Sources mid-tab), if you know your parent/child relationships up front, you can join them in the data source creation phase.
6. Select **Apply**.

The Update Data Source page opens.

7. In the Attributes tab, fill in the necessary information.

For more information about data source attributes, see [Section 6.2.1.5, "Configuring Data Source Attributes"](#).

8. Select **Apply**.

## 6.2.3 Administrating Query Templates

As the audience administrator, you will create query templates. These templates enable your end users to quickly and easily create lists. When creating list, your end user has 2 different list template options to choose from:

- Standard List Template: Retrieve data with natural language (using the natural language query builder tool) instead of using SQL
- Parameterized SQL List Template: Retrieve data by filling in parameters which you specify in SQL statements

### 6.2.3.1 Seeded Standard Query Templates

The ten commonly used standard query templates that are seeded with the Oracle Marketing application are detailed in the table below.

**Table 6–7 Seeded Standard Query Templates**

| Query Template Name                      | Data Source           | Filter Conditions  |
|--|-----------------------|--|
| Cross Sell to Install Base - B2B         | Organization Contacts | Current install base products, purchase amounts, firmographics, and contact profile attributes |
| Cross Sell/Up Sell based on Orders - B2B | Organization Contacts | Purchase history, firmographics, and contact profile attributes                                |
| Customer Acquisition - B2B               | Organization Contacts | Firmographics and contact profile attributes   |
| Customer Retention based on Orders - B2B | Organization Contacts | Purchase history, firmographics, and contact profile attributes                                |
| Lead Maturation - B2B                    | Organization Contacts | Lead information, firmographics, and contact profile attributes                                |
| Interaction Follow Up - B2B              | Organization Contacts | Interaction history, firmographics, and contact profile attributes                             |
| Cross/Sell Up Sell based on Orders - B2C | Persons               | Purchase history, demographics, and person profile attributes                                  |

**Table 6–7 Seeded Standard Query Templates (Cont.)**

| Query Template Name                      | Data Source | Filter Conditions  |
|--|-------------|--|
| Customer Acquisition - B2C               | Persons     | Demographics and person profile attributes                       |
| Customer Retention based on Orders - B2C | Persons     | Purchase history, demographics, and person profile attributes    |
| Interaction Follow Up - B2C              | Persons     | Interaction history, demographics, and person profile attributes |

### 6.2.3.2 Creating Standard Query Templates

Within the Audience Administration interface, you can create additional user-defined query templates to meet your business requirements. These query templates can be based on the out-of-box data sources (Organization Contacts, Persons, Organizations) or any user-defined data source (for example, an industry-specific data mart). You can create these templates using either the Standard or Parameterized SQL template options.

To create a user-defined standard query template, use the following procedure:

#### Prerequisites

Data Sources are created

#### Steps

1. Login to the Audience Administration Dashboard.
2. Select Create Query Template.
3. Enter the following mandatory fields:
  - Query Template Name: Enter a logical name for the template. For example, cross sell list template.
  - Query Template Type: Choose Standard.
  - Data Source Name: Select the data source that will be used for this template. The data source determines the type of data retrieved.
  - Purpose: When the end user is creating a new list, they are required to select a purpose. After selecting the purpose, templates (of that purpose type only) are displayed to them. Therefore, as the administrator, you must



carefully organize your template purposes. Purpose types are seeded, however, you can extend the purpose type lookup.

Seeded Purpose Types:

- Cross Sell: Used for creating lists for the cross selling purposes.
- Customer Acquisition: Used for creating lists for customer acquisition purposes.
- Customer Retention: Used for creating lists for customer retention purposes.
- General Purpose: Used for creating general lists (not tied to a specific purpose).
- Lead Maturation: Used for creating lead maturation lists.
- Up Sell: Used for creating lists for up selling purposes.

4. Select **Continue**.

The Create Standard Template Query page opens.

5. In the Query Template Selections section, select Add Another Row.

6. Fill in the following details:

- Attributes: Using the search and select icon choose an attribute for the query template. For example, if the list template filters by age or gender, you would select age or gender as an attribute.
- Attribute Display Name: Enter a user-friendly display name for the attribute selected.
- Available Operators: Select an operator for the attribute. For example, if filtering by “people who are age 30”, then the operator would be Is. Depending on
- Operator Default: Select a default operator for the attribute.
- Value: Enter a value for this operator. Depending on the available operator and default, you will choose an appropriate value mode. The following modes are available:
  - Calculation: If the data source is being used for “comparison” purposes, use this type of value mode.
  - Constant: If the data source has a static value, select this value mode. For example, if your query template is filtering for “age is 30” then

constant (as a value mode) would be selected. Once constant is selected in the mode drop-down menu, a text box appears. Enter the constant value in this text box. For example, for "age is 30", enter the value 30.

- Attributes: If attributes have previously been defined, you can re-use them by selecting this value mode.
  - List of Values: Selecting this value mode enables you to define a list of values for the data source.
  - Value Display: Use this text box to change the display value for the end user. For example, if the attribute selected is "default city", the value display could simply be "city".
  - Default: Place a check in this checkbox to display the selection by default.
  - Mandatory: Place a check in this checkbox to enforce this particular attribute -- a mandatory selection for a template cannot be deleted by the end-user.
7. Select **Apply** to save your changes.

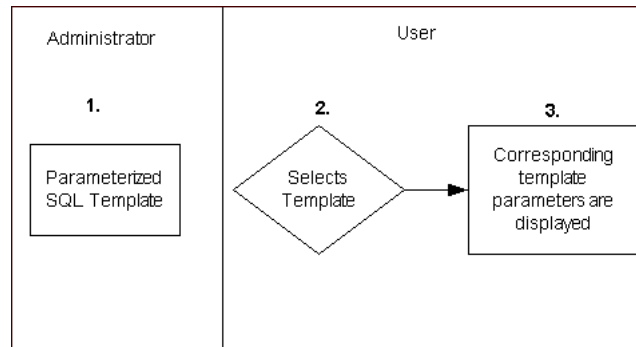
To preview the template before saving your changes, choose Preview Template Selection.

### 6.2.3.3 Creating Parameterized SQL Templates

In some cases, it might be easier to create templates based on a set of parameters. This may be the case when the SQL statement is very complex or if you are a power user of SQL. In these cases, you can set up a template so that the end user only needs to input values for these parameters to generate the list.

If you set up a template using parameterized SQL, then the end user simply selects the template and the corresponding parameters for the template are displayed. The end user selects the *purpose* and the *list template* in the first step of the Create List process. The mechanism to display either the Standard Template (based on natural language) or the Parameterized SQL Template depends on how you have setup the template.

**Figure 6–1 Logical Process of Creating Parameterized SQL Templates**



1. **Step 1:** As the Administrator, you will create the template based on a pre-selected SQL statement. Once you have set this up, when creating lists, the user will only need to input values for these parameters.
2. **Step 2:** During the create list creation process, because you have setup parameterized SQL templates, this is displayed in the drop-down menu (instead of the standard template).
3. **Step 3:** Because the parameters are pre-defined, the corresponding parameterized SQL template parameters are displayed.

To create a parameterized SQL template, use the following procedure:

### Steps

1. Login as a user that has the Audience Workbench Super User responsibility.
2. Navigate to the Audience Administration dashboard.
3. Select Create Query Template.
4. In the Create Query Template page enter the following details:
  - Query Template Name: Provide a logical and relevant name for the template.
  - Query Template Type: Select Parameterized SQL.
  - Data Source Name: Select a Parent Data Source for the template.
  - Purpose: Select a purpose for the template. For example, if creating a list template for cross selling purposes, choose Cross Sell as the purpose type.

5. Select **Continue**.

6. In the SQL definition region you will enter the parameterized SQL condition.

- **Definition:** Use this field to enter editable text for the SQL Description. The text entered here appears in the end user interface within the Selections section for a list that uses this template.
- **SQL:** Use this textbox to enter a parameterized SQL condition. For example,

```
Select * from Table A
where A.COLUMN_NAME1 = :Column_Name1
and A.COLUMN_NAME2 = :Column_Name2"
```

- **Validate SQL:** After entering the custom SQL, you have the option to validate the SQL statement by clicking this button. Clicking this button takes you to the standard Validate SQL page.

There are three sections within the Validate SQL page:

- **SQL Statement:** read only text of the SQL Statement entered in the Custom SQL page
- **SQL Validation:** read only text that indicates if there are any errors in constructing the SQL, like SQL syntax, table names, column names within the table, etc.
- **Index Results:** read only text that identifies if the SQL condition is based on any non-index attributes

7. Select **Finish** to save your work.

### 6.2.3.4 Setting Up Query Templates to Support Recalculation and List Entry Preview

Within the Audience Workbench, a marketer can use query templates to create lists. After selecting a query template, the marketer can enter values for the query template conditions and obtain a quick cascading count of these conditions as well as previewing the entries before creating the list. These counts are based on the values (operator, operand) provided by the marketer for the different query template conditions. The numbers for these cascading counts (i.e., the Projected Running Total column within the List Selections table) is determined using the table created for the corresponding query template.

The information stored in the table is a snapshot of the data available specifically meeting the conditions of the template at the time of template creation. The tables

pre-store the information therefore reducing the need to re-compute the data being queried when the user wants to preview the projected total and entries. Pre-storing the data supports faster viewing of the results.

The table supporting the individual query template is automatically created or updated depending on whether you are creating a new template or updating an existing one. You can also create the tables using a concurrent program.

For seeded query templates (see [Section 6.2.3.1, "Seeded Standard Query Templates"](#)), you must create the tables supporting the template prior to marketers using these templates to obtain cascading counts. Each query template should be enabled before creating its corresponding table. To create tables supporting each of these templates, simply select the appropriate template(s) and click Apply.

The section below illustrates the process of creating a table for a query template if you choose to use a concurrent program.

### Prerequisites

- Before you run the concurrent program to create the table(s), ensure that all the conditions are defined for the corresponding query template(s) and the template is enabled.
- Ensure that there is sufficient disk space. The space requirement for a table is proportional to the customer and transactional data within the data source and the number of conditions within the query template definition. A large B2C (business to consumer) organization will typically have more customer and transactional data than a B2B (business to business) organization. Hence the table created for B2C implementations will normally require more disk space.

The conditions for seeded query templates reference data within the Oracle E-Business Suite schema. It is estimated that these query templates will require approximately 35 MB of disk space for each query template. Based on the Oracle E-Business Suite data within your organization, you may require additional disk space.

### Steps

1. Determine the "query template ID" of the query template for which the table is to be generated. You can obtain this ID by navigating to the details page of the query template within the Audience Administration interface. In the query template details page, the token for the template ID (i.e. TempIID) is contained within the web browser's URL. For example, the template ID is highlighted in the following URL:

```
http://xyz.com/OA_HTML/OA.jsp?OAFunc=AMS_LIST_
QUERYTEMPLSTD_CRE_PG&Mode=UPD&Temp1Id=3012&....
```

Note this template ID for the corresponding query template.

2. Log into Oracle Forms as a user with the Oracle Marketing Administrator responsibility.
3. Navigate to Setups > Concurrent Requests.
4. Within the Find Request window, click the "Submit a New Request" button.
5. In the Submit a New Request window, select "Single Request" and click OK.
6. In the Submit Request window, within the Name field, click on the LOV drop down (...).
7. In the new search window, within the Find field, enter "AMS Generate Table For Template" and click Find.
8. You will now be prompted to enter the template ID. Enter the template ID as noted previously in this procedure.

---

**Caution:** If no template ID is provided in this window, then tables for all enabled query templates will be generated (or regenerated).

---

9. Click **Submit** to start the concurrent program request for generating the table. Note the Request ID. You can monitor the status of this concurrent request by providing the Request ID within the Find Request window.

After the table is created successfully, a marketer can use the query template within the Audience Workbench to determine the cascading counts and preview entries that meet the template conditions.

## 6.2.4 Fatigue Rules and Lists

Fatigue rules provide your end users with a tool that helps prevent them from over contacting customers. As the Campaign/Audience Administrator, you may need to create fatigue rules for your implementation. Refer to [Section 5.2.3, "Administering Fatigue Rules"](#) for more information.

## 6.2.5 Administrating Deduplication Rules

De-duplication rules check for list duplications, such as duplicate names, email addresses, first names, last names, etc. Deduplication rules check data being sent to the TCA APIs.

Because list creation requires a parent data source to be selected, when creating deduplication rules, you are only able to select one that is associated to a parent data source.

To setup deduplication rules, use the following procedure:

### Prerequisites

Data sources are created

### Steps

1. Login as a user that has the Audience Workbench Super User responsibility.
2. Select the data source for which you are creating the deduplication rule.
3. Select De-duplication Rules.
4. Select **Create De-duplication Rule**.
5. Enter the following details:
  - De-duplication Rule Name: Provide a logical name for the rule. For example, if creating a rule to eliminate duplicate email addresses a logical name might be Email De-dupe rule.
  - Description: Provide a logical description for the deduplication rule. For example, if creating a rule to eliminate duplicate email addresses, a logical description might be "email address deduplication rule".
  - Attribute: Select the attribute that the deduplication rule is being created for. For example, if creating a rule to eliminate duplicate email addresses, you could choose Contact Email Address.
  - Word Standardization Rule: Using this drop-down, optionally, select a standardization rule for the corresponding attribute. Word standardization allows words that have alias or alternate spellings to be normalize when going through the de-duplication process.

For example Oracle Pkwy means the same thing as Oracle Parkway. Therefore, when using word standardization, the system will recognize it to be a duplicate when it goes through the deduplication process.

You can standardize words using the following criteria:

- Address
- First Name
- Key Modifier
- Last Name
- Organization Name

6. Select **Apply**.

## 6.2.6 Administrating List Import

To administrate list import, you will perform one or all the following procedures:

- [Section 6.2.6.2, "Performing Existence Checking for List Import"](#)
- [Section 6.2.6.3, "Existence Checking for Persons"](#)
- [Section 6.2.6.4, "Existence Checking for Organization"](#)
- [Section 6.2.6.5, "Existence Checking for Organization Contacts"](#)
- [Section 6.2.6.6, "Existence Checking for Address"](#)
- [Section 6.2.6.7, "Existence Checking Using Original System Reference"](#)

### 6.2.6.1 Understanding Deduplication and Existence Checking for List Import

List import checks for duplicate records during the import process by using deduplication rules and existence checking.

Deduplication rules: Performed before the data is sent to the TCA APIs. For example, if you have created a deduplication rule based on email address and two records exist in a particular file with same email address, the second records is counted as a duplicate and only the first record is processed.

Existence checking: Predefined rules and are used only when the AMS HZ DEDUPE RULES profile is set to "YES".

Existence checking is done for the following:

- Organization
- Org contacts
- Address



- Person

#### **6.2.6.2 Performing Existence Checking for List Import**

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

#### **6.2.6.3 Existence Checking for Persons**

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

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

#### **6.2.6.4 Existence Checking for Organization**

Organization existence checking is based on:

- Name
- Address1
- 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 it does exist then it checks if an organization record exists with this name, address1 and country. If it does not exist then it checks with name and country if this also does not exist then it picks up the maximum(party\_id) record with the same name and without checking address1 and country column.

Even if pick up records with name, address1 and country or name and country it always picks up the maximum party\_id for the organization name.

#### **6.2.6.5 Existence Checking for Organization Contacts**

Org contact Existence checking is based on:

- Person
- First name
- Last name

- Email address
- Phone area code
- Phone number
- Phone extension

First it checks if a person exists with the provided first name and last name if this exists then it checks if a records exists with first name , last name having the same email address and phone area code, phone number and extension. If this does not exist, then it checks the first name , last name with email address. If this also does not exist, then it checks the first name, last name with phone area code, number and extension.

#### **6.2.6.6 Existence Checking for Address**

Address existence checking is based on:

- Address1
- City
- Postal code
- Country

First it checks if there is a location for the provided address1, city, postal code and country column. If this does not exist then it checks for address1 with country and pick up that location if it's available. Otherwise, it creates a new one.

#### **6.2.6.7 Existence Checking Using Original System Reference**

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

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

- Persons (B2C): If original system reference is mapped then existence checking will use this along with Person First Name, Person Last Name and other attributes like Address1, Country, Email Address, Phone Country Code, Phone Area Code and Phone Number to find the exact match. If it is unable to find matching records then the existence checking will be done without the Original System Reference column.

## 6.2.7 Importing Lists from XML or CSV Files

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

### XML Import

The xml import is available for the following:

- Organization
- Person
- Addresses
- Person addresses import

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

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

### B2B and B2C CSV List Import

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

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

## 6.2.8 Implementing List Import for Universal Work Queue

When Oracle Marketing is integrated with Oracle Telesales, the list import feature can be used to assign lists to TeleSales Agents. In this scenario, a TeleSales agent can log into Oracle TeleSales Universal Work Queue and access a list of customers assigned to them by the marketing team. This enables a list of prospects collected in marketing to be followed up on by the sales team.

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

- [Section 6.2.8.1, "Setting List Import and Work Queue Profiles"](#)
- [Section 6.2.8.2, "Implementing List Import for Telesales"](#)
- [Section 6.2.8.3, "Selecting the List in Telesales"](#)

### 6.2.8.1 Setting List Import and Work Queue Profiles

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

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

### 6.2.8.2 Implementing List Import for Telesales

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

#### Prerequisites

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

#### Steps

1. Log in to Oracle Marketing.
2. Navigate to Audience > Import.

Use this page to import data from the csv file.

3. Using the Import Mapping section, map the sales agent column from the Source Column to the “Sales Agent ID” target field column.

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

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

### 6.2.8.3 Selecting the List in Telesales

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

#### Prerequisites

User has TeleSales Agent Responsibility

#### Steps

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

## 6.2.9 Creating List Import User Hooks

List Import pre and post user hooks allow you to write custom PL/SQL that is invoked during the list import process prior to list generation. The purpose is to allow you to cleanse the list before the list data is inserted into TCA (pre) and after (post) before list generation.

The following business events are used in the list import user hook process:

**List Import - Pre Business Event:** oracle.apps.ams.list.ListImportPreEvent.

**List Import - Post Event:** oracle.apps.ams.list.ListImportPostEvent



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# Implementing Events

This topic group describes the implementation of Events functionality.

Topics include:

- [Section 7.1, "Events Overview"](#)
- [Section 7.2, "Setting System Profile Options for Events"](#)
- [Section 7.3, "Creating and Verifying Lookups for Events"](#)
- [Section 7.4, "Running Concurrent Programs for Events"](#)
- [Section 7.5, "Setting Up Event Fulfillment"](#)

## 7.1 Events Overview

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

Consult the following sections to set up Events functionality:

- [Section 7.2, "Setting System Profile Options for Events"](#)
- [Section 7.3, "Creating and Verifying Lookups for Events"](#)
- [Section 7.4, "Running Concurrent Programs for Events"](#)
- [Section 7.5, "Setting Up Event Fulfillment"](#)

## 7.2 Setting System Profile Options for Events

Set the following profile options for Events:

**Table 7–1   Profile Options for Events**

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



**Table 7–1 Profile Options for Events (Cont.)**

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

## 7.3 Creating and Verifying Lookups for Events

Create or verify the following system lookups for Events.

**Table 7–2    Event Lookups**

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

**Table 7–2 Event Lookups (Cont.)**

| Key                    | Type       | Values  | Meanings   |
|------------------------|------------|---|--|
| AMS_EVENT_TYPE         | Extensible | Briefing<br>Conference<br>Exhibition<br>Hospitality<br>Internal_Event<br>Launch<br>Seminar<br>Speaking_<br>Engagement<br>Sponsorship_<br>Event<br>Trade_Show<br>Web_Seminar<br>Workshop | Briefing<br>Conference<br>Exhibition<br>Hospitality<br>Internal Event<br>Launch<br>Seminar<br>Speaking<br>Engagement<br>Sponsorship<br>Trade Show<br>Web Seminar<br>Workshop |
| AMS_CONTACT_POINT_TYPE | Extensible | Address<br>Email<br>Fax<br>Inbound_script<br>Outbound_script<br>Phone<br>Website  | Address<br>Email<br>Fax<br>In bound Script<br>Outbound Script<br>Phone<br>Website  |
| AMS_MASTER_OBJECT_TYPE | System     | Camp<br>CSCH<br>EONE<br>EVEH  | Campaign<br>Campaign Schedule<br>One-Off Event<br>Event  |
| AMS_PRIORITY           | System     | Fast_Track<br>High<br>Standard  | Fast Track<br>High<br>Standard   |

**Table 7–2 Event Lookups (Cont.)**

| Key                         | Type   | Values  | Meanings   |
|-----------------------------|--------|---|--|
| AMS_EVENT_SPEAKER_STATUS    | System | Booked<br>Cancelled<br>Confirmed<br>Scheduled   | Booked<br>Cancelled<br>Confirmed<br>Scheduled  |
| AMS_EVENT_WAITLIST_ACTION   | System | First_Come_First  | First Come First Served  |
| AMS_EVENT_RESOURCE_TYPE     | System | AMS_People  | People   |
| AMS_EVENT_REG_STATUS        | System | Cancelled<br>Enrolled<br>Registered<br>Targeted<br>Waitlisted   | Cancelled<br>Enrolled<br>Registered<br>Targeted<br>Waitlisted  |
| AMS_EVENT_REG_SOURCE        | System | Call_Center<br>External<br>On_Site<br>Partner<br>Web  | Call Center<br>External<br>On Site<br>Partner<br>Web   |
| AMS_EVENT_REG_CANCEL_REASON | System | Agenda_Change<br>Cost<br>Personal_Emergency<br>Price_Change<br>Sch_Conflict<br>Speaker_Change<br>Venue_Change<br>Work_Emergency | Agenda Change<br>Cost<br>Personal Emergency<br>Price Change<br>Scheduling Conflict<br>Speaker Change<br>Venue Change<br>Work Emergency |

**Table 7–2 Event Lookups (Cont.)**

| Key                          | Type   | Values   | Meanings   |
|------------------------------|--------|--|--|
| AMS_EVENT_PAYMENT_STATUS     | System | Comp<br>Free<br>Invoiced<br>Paid<br>Refunded   | Complimentary<br>Free<br>Invoiced<br>Paid<br>Refunded  |
| AMS_EVENT_LEVEL              | System | Main<br>Sub  | Main<br>Sub  |
| AMS_EVENT_DAY                | System | Five<br>Four<br>Three<br>Two<br>One  | 5<br>4<br>3<br>2<br>1  |
| AMS_EVENT_CERT_CREDIT_TYPE   | System | General<br>Seed  | General<br>Seed  |
| AMS_EVENT_CANCEL_REASON      | System | Disaster<br>Insufficient_Reg<br>Postponed<br>Schedule_Conflict<br>Speaker_Unavailable<br>Venue_Unavailable               | Natural Disaster<br>Insufficient Registration<br>Postponed<br>Schedule Conflict<br>Speaker not available<br>Venue not available  |
| AMS_EVENT_ATTENDANCE_FAILURE | System | Agenda_Change<br>Disaster<br>Personal_Emergency<br>Schedule_Conflict<br>Speaker_Change<br>Venue_Change<br>Work_Emergency | Agenda Change<br>Natural Disaster<br>Personal Emergency<br>Schedule Conflict<br>Speaker Change<br>Venue Change<br>Work Emergency |

**Table 7–2 Event Lookups (Cont.)**

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

## 7.4 Running Concurrent Programs for Events

For Events, run the program **Activate Event Schedules**. This program accomplishes two things:

1. **Activates Events:** This program activates available event schedules and one-off events for which the start date has passed.
2. **Completes Events:** Picks up and completes event schedules and one-off events for which the end date has passed.

## 7.5 Setting Up Event Fulfillment

See [Section 3.2.4, "Implementing Fulfillment for Oracle Marketing"](#) for information on setting up fulfillment for Events.





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# Implementing and Administrating Marketing Metrics

This topic group includes implementation and administration tasks for Metrics.

Topics include:

- [Section 8.1, "Metrics Concepts"](#)
- [Section 8.2, "Implementing Metrics"](#)
- [Section 8.3, "Administrating Metrics"](#)
- [Section 8.4, "Seeded Metrics Reference"](#)

# 8.1 Metrics Concepts

Metrics are measurements used for tracking the effectiveness of marketing activities. Metrics include both forecast and actual values. These values are either added manually or automatically calculated by the Marketing application. Metrics can also be used to initiate Campaign Triggers. For example, a Responses Count metric greater than a desired value could be used to trigger a follow-up Campaign Schedule to a larger audience.

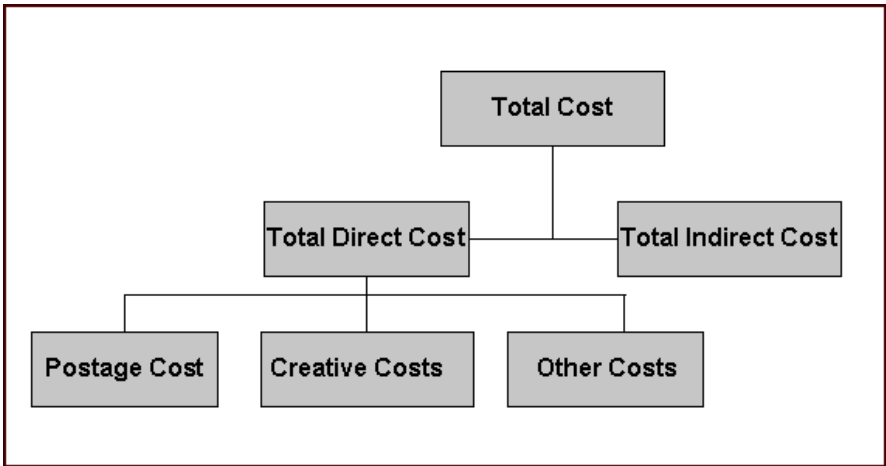
## 8.1.1 Understanding the Metric Object Hierarchy

The metric hierarchy dictates how objects relate to each other and how their associated metric values will rollup within the hierarchy. Ultimately, the metric hierarchy dictates how metric values will be totalled across marketing objects.

## 8.1.2 Understanding Summary Hierarchy

Within a single marketing object, metrics of similar categories (cost, revenue, response, etc.) are organized into summary hierarchies. For example, within a direct mail campaign schedule, cost-category metrics can be related hierarchically as follows:

Figure 8–1 Summary Hierarchy

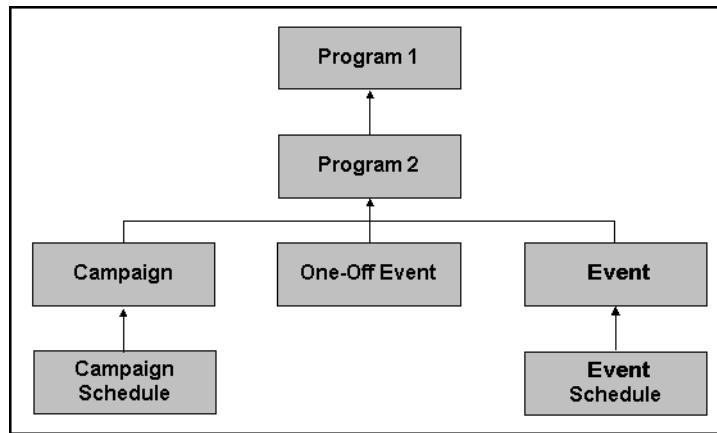


In this example, postage cost, Creative Costs, and Other Costs are summarized to Total Direct Cost. These lower level costs are added to Total Indirect Cost (for example, overhead expenses) to obtain Total Cost for the Campaign Schedule.

### 8.1.3 Understanding Rollup Hierarchy

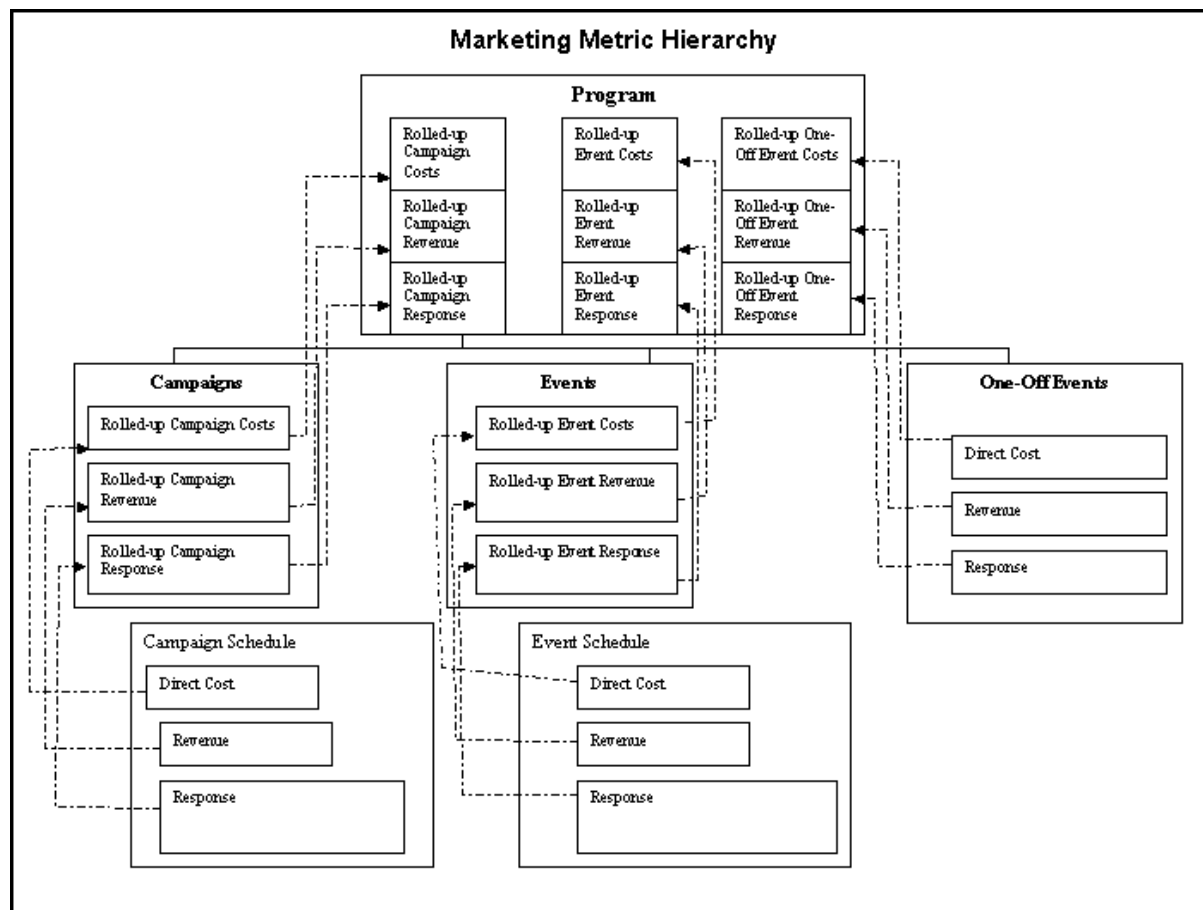
The Rollup Hierarchy refers to links between metrics of different objects within the marketing object hierarchy. A typical marketing object hierarchy is shown below:

**Figure 8–2 Rollup Hierarchy**



The Rollup Hierarchy enables metrics from lower-level marketing objects (e.g., Campaign Schedules and Event Schedules) to be rolled up to parent objects (Campaigns and Events) and grandparent objects (Programs).

The following represents a detailed Rollup Metric Hierarchy. In this example, Direct Costs, Revenues and Responses are rolled up the marketing object hierarchy from the Schedule level to the Campaign/Event level to the Program level.

**Figure 8–3 Marketing Rollup Metric Hierarchy**

### 8.1.4 Understanding Metric Calculation Types

The metric calculation type determines the way in which forecast and actual values for a metric are entered into the system.

Four metric calculation types are available:

- **Manual:** Receives both forecast and actual values from user input.
- **Function:** Receives actual values from a custom PL/SQL function or stored procedure. This function or procedure contains logic for calculating the actual value based on information within the Oracle E-Business Suite.

- **Summary:** Receives both forecast and actual values from lower-level metrics in the summary hierarchy. May have subordinate metrics of any type (summary, manual, rollup or function) within the same metric category (Cost, Revenue, Response, etc.). This metric is automatically associated with a marketing object when any subordinate metric is associated.
- **Rollup:** Receive both forecast and actual values from lower levels in the marketing object hierarchy. Only manual and function metrics within a lower-level object (e.g. Campaign Schedule) can be linked to a rollup metric in a higher-level object (e.g. Campaign). All child metrics of a rollup metric must be in the same metric category (Cost, Revenue, Response, etc.).
- **Formula:** Enables a marketers to measure the performance of a marketing object based upon a composite value. Marketers can define a formula based upon relevant metrics to calculate this composite value.

### 8.1.5 Understanding Metric Display Types

It drives the method in which metric values are rendered on the screen. Possible types are integer, percent and currency. Integers are displayed and saved as whole numbers.

### 8.1.6 Understanding Metric Currency Values

Metrics with the categories of Cost and Revenue have an attribute of "Currency". Two currencies apply to each metric, one for the displayed (transactional) value and one for the internal (functional) value.

Rollup and Summary metrics display the currency value according to the marketing object's currency. Manual and Function metrics are defaulted to the marketing object's currency but may be changed for each metric. All Cost and Revenue metrics are rolled up using the internal functional currency, which is the same system wide. Use FND\_PROFILE.VALUE ('AMS\_DEFAULT\_CURR\_CODE') to determine functional currency.

The transactional value is rounded to the GL 'Minimum Accountable Unit'. The function value is stored without rounding to maintain required precision when converting to the displayed (transactional) currency.

For example if the transactional currency is Mexican Paso (MXP) and functional currency is US Dollar (USD), with the conversion rate of 15,000 MXP/USD then conversion from 10,001 MXP to 0.67 USD (rounded), converting back produces 10,050 MXN, and removing the rounding on the functional currency produces 0.66673333 -- USD to 10,001 MXN.

## 8.2 Implementing Metrics

A number of commonly used metrics are seeded with the product and enabled at time of deployment. If implementing additional metrics, defined specifically for your organization, as the Marketing Administrator you must create and set up these up. The procedures in this section will demonstrate how to accomplish that.

### 8.2.1 Process Flow for Creating Metrics

Metric creation will depend on the marketing object being measured. When creating a new metric for a marketing object, a calculation method must be selected. The calculation method indicates how a metric receives input values. For example, if the calculation method “values roll up from lower level” is selected, the metric values will roll up from a lower level marketing object.

When creating a new Metric, it can be simple or very complicated, depending on the aspect of the marketing object being measured. Regardless of the complexity, the process flow for creating a metric remains constant. The general flow is shown below.

**Figure 8–4 Process Flow Diagram: Creating Metrics**



### 8.2.2 Setting Metric Profile Options

To maximize metric performance, set the profile **AMS : Batch Size** at **site** level. This profile takes an integer that represents the maximum number of records to save in a batch. This helps tune the performance of the metric refresh program. By setting this profile, when updates or inserts are performed, they are limited to the batch size. This prevents the rollback segment from becoming too big and saves any intermediate processing. If the program fails then not all the work would be lost. The refresh would start from where it left off. The batch processing is written to prevent committing any corrupt state.

### 8.2.3 Implementing Summary Metrics

Summary metrics enable values to be calculated vertically in the hierarchy. Values are totalled at the marketing object level. Summary metrics may have subordinate

metrics of any type (summary, manual, or function). Summary metrics should be created to total the manual metrics at that marketing object level.

Summary Metrics are assigned automatically to the marketing object when any subordinate metric is assigned.

For example, you can create a summary metric called "Total Cost" that is used with any object type. Then create other cost metric for campaign schedules, such as "Venue Costs", "Postage Costs", etc. all of which summarize to "Total Cost". When assigning "Venue Costs" and "Postage Costs" to a campaign schedule, Total Cost will add these values together to give a summary value.

Summary metrics can be rolled up at same level but are not permitted to be rolled up to parent level.

Use the following procedure to create a summary metric:

### **Prerequisites**

None

### **Steps**

1. Navigate to Administration > Marketing > General > Metric.
2. Select **Create**.
3. In the Metrics Definition page enter the following:
  - Enter a Name for the metric.
  - Navigate to the Calculation type region.
  - Although you are not finished filling in the metric details, to simplify the process of choosing a "used with" object, select a calculation type up front.
  - In the Calculation type region select Summarize.  
By selecting this type of calculation, the "used with" object is automatically populated with *Any*.
  - Select a Category from the Seeded List.
  - Select a Sub category if one is available.
  - Select a Display Type.  
Display type drives how the metric values are displayed in the UI. Select either integer, percent or currency.

- Select an Aggregation type.

The aggregation type drives the method that calculates the summary metric. It can be calculated by *summarization* or by *average*. When using summarization, all child values are totalled. When using average, instead of creating a total an average is created.

Note: The accrual region only applies to manual and function metrics. Therefore, this region is disabled.

4. Optionally, in the Summarize To region select Summarize at Same Level

If selecting this option, the value of the metric being created is summarized to this metric. However, both metrics will always be attached to the same marketing object.

Only rollup to parent when using *manual*, *rollup*, or *calculate using PL/SQL* metric.

5. Select **Create**.

## 8.2.4 Implementing Rollup Metrics

A rollup metric receives its values from lower level marketing objects. A rollup metric must have the same category as all of its child metrics.

Manual and Function Metrics are assigned to a Rollup Metric, therefore results can be propagated to parent marketing objects. Rollup Metrics may be assigned to themselves so that any hierarchical marketing object structure will collect all values from subordinate objects. Values cannot be entered. All values are totaled from the child level. Rollup Metrics always have a Used With field value of Any.

For example, you may want to establish a venue cost at the Event Schedule level. To view venue costs across multiple Event Schedules, a rollup metric called “Rolled-up Venue cost” can be created for the “Venue cost” manual metric. The rollup metric will appear at the Event and program levels totaling all 'Venue Costs' from the Event Schedules.

To create a Rollup Metric follow the procedure below:

### Prerequisites

None

### Steps

1. Log in to Oracle Marketing.



2. Navigate to the Administration > Marketing > General > Metric.
3. Select **Create**.
4. Enter the Metric name.
5. Select calculation type Rollup.
6. Select **Create**.
7. To have the rollup metric continue to rollup the marketing object hierarchy, set the “Summarize to: of the parent” to this same rollup metric.

---

**Note:** To have a rollup metric recursively rollup to itself, you will need to create the rollup with "of the parent" blank then update the rollup metric with this field assigned to itself. During creation of the rollup metric it does not have an entry in the database and the LOV will not show this as an entry.

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8. Set: Summarize to: at the same level” to the desired summary metric to total at the same object level.
9. Select Update to save your work.

## 8.2.5 Implementing Manual Metrics

A manual metric receives values from user input. Manual metrics are entered by hand into the system.

For example, an Oracle Marketing Administrator can create a manual metric for the Campaign Schedule object called “Venue Cost”. This enables a marketer who is using the application to manually enter costs associated with Venues.

- Each manual metric can be assigned to an object multiple times. A transaction date and description distinguishes each entry.
- Each metric is optionally assigned a summary metric, which totals values within the same marketing object. When the manual metric is assigned to the object, the summary metric is also assigned. The summary metric must have the same category, display type, and aggregation type as all its child metrics.
- Each metric is optionally assigned a Rollup Metric, which totals value at the parent business object. When the values of a marketing object are refreshed the rollup metric is either created at the parent level, or if the appropriate rollup metric exists, a link is made so the rollup can determine which values to total.

The Rollup Metric must have the same category, display type, and aggregation type as all its child metrics.

A manual metric receives values from user input. Manual metrics are entered by hand into the system.

For example, an Oracle Marketing Administrator can create a manual metric for the Campaign Schedule object called "Venue Cost". This enables a marketer who is using the application to manually enter costs associated with Venues.

To create a Manual Metric, follow the procedure below:

### Prerequisites

None

### Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > General > Metric.
3. Select **Create**.
4. In the General Information Section, enter the following details:
  - Name: Give the metric a name, for example, Venue Cost.
  - Enabled: Select to enable the metric.
  - In the Calculation section select Enter Values Manually (default setting.)
  - Category: Choose a category to associate the Metric with. For example, Cost.
  - Sub-Category. Choose a sub-category associated to the category selected above.
  - Used With: Select the marketing object that will use this metric.
  - Description: Enter a meaningful description for this metric.
5. In the Summarize To section select a Parent level/and or Same Level metric.

This step is optional and only is performed if the manual metric created will be Rolled up to a parent or Summarized at same level.
6. Select **Create**.

## 8.2.6 Implementing PL/SQL Programs for Metrics

PL/SQL Program Metrics enables the Metrics Refresh Engine to interface with database stored procedures and functions. This allows for the implementation of customized logic for calculating metric values based on business needs. Each time the Refresh Metric Engine is invoked, all PL/SQL Program metrics in the system are executed.

Two types of PL/SQL Program metrics are supported:

- **Procedure:** Procedure Metrics, based on database stored procedures, are executed once regardless of how many times it is used in the system. For example, seeded procedure metrics are used to calculate the number of leads generated from a campaign schedule. Each lead generated is assigned a source code that references a marketing object. The number of leads for a campaign schedule is determined by counting the number of leads with the same source code linked to the campaign schedule.
- **Function:** Function Metrics, based on database stored functions, are executed once for each usage. For example, if 10 Campaigns use the Function Metric, the function is executed 10 times.

For performance purposes, use of Procedure Metrics are highly recommended over Function Metrics. As the data grows the overhead of function metrics grows proportionally. Execution of the function is proportional to the number of instances of the function metric are attached to objects. Where as, procedure metrics are executed once per refresh no matter the size of data. The queries and other program logic are executed once to gather all the required data in bulk and then written in bulk to the activity metric table.

## 8.2.7 Implementing Procedure Metrics

Procedure Metrics are intended for enabling metric value calculations to be performed in a batch mode. Because Procedure Metrics are expected to update metric values for multiple Marketing objects, the database bulk update features are used.

To understand and implement Procedure Metrics see the following:

- [Section 8.2.7.1, "Procedure Metric Overview"](#)
- [Section 8.2.7.2, "Anatomy of a Procedure Metric"](#)
- [Section 8.2.7.3, "Creating a Procedure Metric"](#)
- [Section 8.2.7.4, "Sample Procedure Metric for Calculating Leads"](#)

- [Section 8.2.7.5, "Calculation Logic"](#)
- [Section 8.2.7.6, "Using Bulk Collect and Update for Procedure Metric Queries"](#)

### 8.2.7.1 Procedure Metric Overview

The first select statement represents when the procedure metric is called by the **AMS – Metric Refresh program** concurrent program. This select statement queries for all activity metrics system wide that are relevant to this operation. The query is not specific to any marketing object.

The second select statement (within “**ELSIF p\_arc\_act\_metric\_used\_by = ‘CSCH’ THEN**”) is for a specific object to update. In this case a campaign schedule. The query adds to the where clause for the specific object from the input parameters.

The output of these queries includes a list of activity metric ids and corresponding actual values. Bulk Collect is used to maximize the processing of the query. These results are passed to ‘**UPDATE\_ACTMETRICS\_BULK**’ to do a bulk update of the activity metrics table. This update also includes setting the dirty flag of the parent activity metrics to be refreshed.

A check should be made to prevent updating the actual value if it has not changed. For example, if the number of leads for a campaign schedule is 20 and on refresh the leads are calculated to be 20 again then do not update the activity metric. The list of activity metric ids and actual values should not include these items. If the activity metric is updated then the refresh engine will attempt to recalculate the rollup and summary metrics, thus wasting processing.

### 8.2.7.2 Anatomy of a Procedure Metric

A Procedure Metric must have the following parameters:

**Table 8–1 Procedure Metric Parameters**

| Parameter Name           | Data Type | Default Value |
|--------------------------|-----------|---------------|
| p_arc_act_metric_used_by | VARCHAR2  | Null          |
| P_act_metric_used_by_id  | NUMBER    | Null          |

### 8.2.7.3 Creating a Procedure Metric

This metric is executed once per refresh for each metric with the same procedure name. All values must be computed and saved in memory for a bulk update.

Procedure metrics are not supported for Cost or Revenue metrics. Once a cost metric has been posted to the budget the actual value cannot be updated. Currency conversions are expensive to process.

An API is used to perform the bulk update. Because of efficiency very little validation is performed.

## Procedure Metric Sample

```
PROCEDURE run_metrics(p_arc_act_metric_used_by VARCHAR2 := NULL,
p_act_metric_used_by_id NUMBER := NULL)
IS
    l_actual_values_table num_table_type;
    l_activity_metric_id_table num_table_type;
BEGIN
    IF p_arc_act_metric_used_by IS NULL THEN
        SELECT NVL(actual_value, 0), activity_metric_id
        bulk collect INTO l_actual_values_table,
                        l_activity_metric_id_table
        FROM some_table
    ELSIF p_arc_act_metric_used_by = 'CSCH' THEN
        SELECT NVL(actual_value, 0), activity_metric_id
        bulk collect INTO l_actual_values_table,
                        l_activity_metric_id_table
        FROM some_table
        WHERE object_type = 'CSCH'
    END IF;
    update_actmetrics_bulk(l_activity_metric_id_table,
                          l_actual_values_table);
END;
```

See AMS\_ACTMETRIC\_SEED\_PVT.Calculate\_Seed\_Metrics for a detailed use of Procedure Metrics.

To create a Procedure Metric follow the procedure below:

## Prerequisites

None

## Steps

1. Log in to Oracle Marketing.
2. Navigate to the Administration > Marketing > General > Metric.
3. Select **Create**.

4. Enter the Metric name:

For example, choose: My Procedure Metric, Category - Response, Sub Category - none, Used With - Campaign Schedule, Return Value - Numeric, Description - optional. Select the Calculation 'Calculate Using Program', and enter the procedure name, 'SCHEMANAME.RUN\_METRICS'. And, enter summary and rollup metrics at will.

5. Select **Create**.

Verify metric on the Overview page.

6. Navigate to the Campaign Schedule.

7. Assign this metric to the a Campaign Schedule.

This procedure is executed when either the refresh button is pressed or the concurrent metrics engine executes. Verify results with source tables.

#### 8.2.7.4 Sample Procedure Metric for Calculating Leads

The following is a sample procedure Metric for Leads. This is an excerpt from package AMS\_ACTMETRICS\_SEED\_PVT.

```
PROCEDURE Calculate_Seeded_Metrics(  
    p_arc_act_metric_used_by VARCHAR2 := NULL,  
    p_act_metric_used_by_id NUMBER := NULL)  
IS  
    l_actual_values_table Ams_Actmetrics_Seed_Pvt.num_table_type;  
    l_activity_metric_id_table Ams_Actmetrics_Seed_Pvt.num_table_type;  
BEGIN  
    -- Get all object data to update.  
    IF p_arc_act_metric_used_by IS NULL THEN  
        SELECT NVL(actual_value, 0), activity_metric_id  
        bulk collect  
        INTO l_actual_values_table, l_activity_metric_id_table  
        FROM  
            (SELECT actual_value, activity_metric_id  
            FROM(  
                --R9 Campaign Schedule/Leads  
                SELECT  
                /*+ index(X AS_SALES_LEADS_N4)  
                 index(B ams_campaign_schedules_b_u1)  
                 index(ALB ams_metrics_all_b_n3)  
                 index(c ams_source_codes_u2)  
                 index(Y as_statuses_b_u1)  
                 index(AL AMS_ACT_METRICS_ALL_N5) */
```

```

COUNT(1) actual_value, AL.activity_metric_id,
        AL.func_actual_value
FROM ams_campaign_schedules_b B, ams_source_codes C,
     as_sales_leads X, as_statuses_b Y,
     ams_act_metrics_all AL, ams_metrics_all_b ALB
WHERE X.status_code = Y.status_code
AND B.schedule_id = C.source_code_for_id
AND C.arc_source_code_for = 'CSCH'
AND Y.lead_flag = 'Y'
AND Y.enabled_flag = 'Y'
AND B.source_code = C.source_code
AND X.source_promotion_id = C.source_code_id
AND NVL(X.DELETED_FLAG, 'N') <> 'Y'
AND AL.arc_act_metric_used_by = 'CSCH'
AND AL.act_metric_used_by_id = B.schedule_id
AND AL.metric_id = ALB.metric_id
AND ALB.metric_category = 906 -- Leads
AND ALB.function_name
     = 'AMS_ACTMETRICS_SEED_PVT.CALCULATE_SEEDED_METRICS'
AND ALB.metric_calculation_type = 'FUNCTION'
GROUP BY AL.activity_metric_id, AL.func_actual_value)
WHERE NVL(actual_value, 0) <> NVL(func_actual_value, -1)
);
ELSIF p_arc_act_metric_used_by = 'CSCH' THEN
SELECT NVL(actual_value, 0), activity_metric_id
bulk collect
INTO l_actual_values_table, l_activity_metric_id_table
FROM (
SELECT actual_value, activity_metric_id
FROM(
--R9 Campaign Schedule/Leads
SELECT
/**+ index(X AS_SALES_LEADS_N4)
      index(B ams_campaign_schedules_b_u1)
      index(ALB ams_metrics_all_b_n3)
      index(C ams_source_codes_u2)
      index(Y as_statuses_b_u1)
      index(AL AMS_ACT_METRICS_ALL_N5)*/
COUNT(1) actual_value, AL.activity_metric_id,
        AL.func_actual_value
FROM ams_campaign_schedules_b B, ams_source_codes C,
     as_sales_leads X, as_statuses_b Y,
     ams_act_metrics_all AL, ams_metrics_all_b ALB
WHERE X.status_code = Y.status_code
AND B.schedule_id = C.source_code_for_id

```

```
        AND C.arc_source_code_for = 'CSCH'
        AND Y.lead_flag = 'Y'
        AND Y.enabled_flag = 'Y'
        AND B.source_code = C.source_code
        AND X.source_promotion_id = C.source_code_id
        AND NVL(X.DELETED_FLAG, 'N') <> 'Y'
        AND AL.arc_act_metric_used_by = 'CSCH'
        AND AL.act_metric_used_by_id = B.schedule_id
        AND AL.metric_id = ALB.metric_id
        AND AL.ACT_METRIC_USED_BY_ID = p_act_metric_used_by_id
        AND ALB.metric_category = 906 -- Leads
        AND ALB.function_name =
            'AMS_ACTMETRICS_SEED_PVT.CALCULATE_SEEDED_METRICS'
        AND ALB.metric_calculation_type = 'FUNCTION'
    GROUP BY AL.activity_metric_id, AL.func_actual_value
    )
    WHERE NVL(actual_value,0) <> NVL(func_actual_value,-1)
    );
END IF;
update_actmetrics_bulk(l_activity_metric_id_table,
                      l_actual_values_table);
END Calculate_Seeded_Metrics;
```

### Local Variables

Two PL/SQL tables are needed to “bulk” capture the activity\_metric\_id and the calculated values corresponding to the ID's. The two tables should be of type num\_table\_type from the package ams\_actmetrics\_seed\_pvt:

- l\_values\_tab Ams\_Actmetrics\_Seed\_Pvt.num\_table\_type;
- l\_ids\_tab Ams\_Actmetrics\_Seed\_Pvt.num\_table\_type;

#### 8.2.7.5 Calculation Logic

The body of the procedure consists of code to select the values from a business-specific table. The business table needs to be able to join with a corresponding Marketing object table, such as Campaigns.

The activity metric table includes the id and object type of the corresponding object. For a campaign, the field arc\_act\_metric\_used\_by is 'CAMP' and act\_metric\_used\_by\_id is the campaign id.



**Table 8–2 Object Type**

| Object Type       | Object Code | Table Column and Reference              |
|-------------------|-------------|---|
| Campaign          | CAMP        | AMS_CAMPAIGNS_ALL_B.CAMPAIGN_ID         |
| Campaign Schedule | CSCH        | AMS_CAMPAIGN_SCHEDULES_B.SCHEDULE_ID    |
| Event             | EVEH        | AMS_EVENT_HEADERS_ALL_B.EVENT_HEADER_ID |
| Event Schedule    | EVEO        | AMS_EVENT_OFFERS_ALL_B.EVENT_OFFER_ID   |
| One-Off Event     | EONE        | AMS_EVENT_OFFERS_ALL_B.EVENT_OFFER_ID   |
| Deliverable       | DELV        | AMS_DELIVERABLES_ALL_B.DELIVERABLE_ID   |
| Dialog            | DILG        | AMS_DIALOGS_ALL_B.DIALOG_ID             |

Within the object the specific relevant metrics can be referenced by the metric\_id. Thus to write the select statement the where clause includes

- WHERE Actmetric.Arc\_act\_metric\_used\_by = <object\_code>
- AND actmetric.act\_metric\_used\_by\_id = <object\_id>
- AND actmetric.metric\_id = <metric\_id>

Where the object\_id is a join to the business table that references the marketing object. The metric\_id needs to match the procedure metrics' id. To find the correct metric id query the metric table for the matching procedure name. For example:

- SELECT metric\_id, metrics\_name, arc\_metric\_used\_for\_object
- FROM ams\_p\_metrics\_v
- WHERE FUNCTION\_NAME = 'SCHEMANAME.RUN\_METRICS' -- Use upper case.

#### 8.2.7.6 Using Bulk Collect and Update for Procedure Metric Queries

Procedure metric queries must utilize 'BULK COLLECT' feature of PL/SQL to maximize performance. Bulk Collect minimizes the amount of context switching required by fetching values one at a time. Bulk Collect changes context to SQL to read in all values to PL/SQL arrays, which reduces context switching to once. After the data is fetched, the procedure must execute the bulk update procedure:

```
Ams_Actmetrics_Seed_Pvt.update_actmetrics_bulk (  
    l_activity_metric_ids_tab,  
    l_actual_values_tab);
```

## 8.2.8 Implementing Function Metrics

Function metrics execute the PL/SQL function for each instance of the activity metric on the system. The return value of a number is the actual value for the activity metric to update.

To understand and implement Function Metrics see the following:

- [Section 8.2.8.1, "Function Metric Overview"](#)
- [Section 8.2.8.2, "Anatomy of a Function Metric"](#)
- [Section 8.2.8.3, "Sample Activity Function Metric"](#)
- [Section 8.2.8.4, "Creating a Function Metric"](#)

### 8.2.8.1 Function Metric Overview

The stored PL/SQL function or procedure name must be the full name which includes the schema name, package name, and module name (if applicable). Function metrics are similar to a manual metric leaf level metric, data values are entered, however, difference forecasted (marketing is expending) values vs. actual (what they actually spend).

A Function metric is executed once for each assigned metric to a marketing object. The parameter for the function is the activity metric id, which distinctly references the marketing object.

For the marketing object specification - use the following query parameters:

- Table: AMS\_ACT\_METRICS\_ALL
- Object type: ARC\_ACT\_METRIC\_USED\_BY
- Object id: ACT\_METRIC\_USED\_BY\_ID

The function metric returns the actual value to be set. In the case of Cost and Revenue metrics the actual value must be in the 'Default Currency'. (Use Fnd\_Profile.Value ('AMS\_DEFAULT\_CURR\_CODE') to derive the default currency). For Costs, once the cost is posted to a budget the actual value cannot be updated.

Because function metrics are executed once per object and the value is updated one at a time, this method is very slow when processing thousands of metrics.

### 8.2.8.2 Anatomy of a Function Metric

The parameters include the activity metric id. Each execution of this function is for a single activity metric to retrieve the current actual value. The activity metric id is passed as the parameter. With this activity metric id the all the information about the activity metric can be accessed including the relevant object and current values. The actual value calculation may include counting a number of items, such as leads, or totaling values such as revenue.

### 8.2.8.3 Sample Activity Function Metric

The value returned is updated in the corresponding AMS\_ACT\_METRICS\_ALL record. Currency conversion is performed for Cost and Revenue metrics.

```
FUNCTION run_metric(p_activity_metric_id IN NUMBER)
RETURNS NUMBER
IS
    l_actual_value NUMBER;
BEGIN
    -- Query actual value
    SELECT actual_value
    INTO l_actual_value
    FROM business, ams_act_metrics_all actmetric
    WHERE actmetric.activity_metric_id = p_activity_metric_id
    AND business.id = actmetric.act_metric_used_by_id;
    RETURN l_actual_value;
END;
```

### 8.2.8.4 Creating a Function Metric

To create a Function Metric (using the example above), use the following procedure:

#### Prerequisites

None

#### Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > General > Metric.
3. Select **Create**.
4. In the General Information Section, enter the following details:
  - Name: Give the metric a name, for example, Function\_Test.

- Enabled: Select to enable the metric.
  - Category: In the drop-down menu, choose a category to associate the Metric with. For example, Cost.
  - Used With: Select the marketing object that will use the Metric. For example, Campaign.
  - Description: Enter a meaningful description for this metric.
5. In the Calculation section, select Calculate Using Program. Enter the schema, package, and function name.
  6. In the Summarize To section select a Parent level/and or Same Level object.  
This step is optional and need only be performed if the manual metric being created is to be Rolled up to a parent or Summarized at same level.

### 8.2.9 Implementing Variable Metrics

When creating a variable metric you are required to select a *multiplier metric*. A multiplier metric can be any manual or function metric with the same "Used With" object - is not a cost or revenue category.

The variable metric unit value can be entered by the user for forecast value. However, the actual unit value is calculated based on the actual value divided by the actual value of the multiplier metric.

When the variable metric is assigned to a marketing object the multiplier metric is also assigned (if not already present). When the metrics are refreshed the variable metric is updated.

For example, "postage costs" can be associated to a number of people in a target group (contacts). To contact them you have a mailer you sent out, and postage for this is .37/person. You have 500 people in the target contact group. The variable metric takes .37 and multiplies it by the # of people in your contact group.

#### Prerequisites

The multiplier metric must be defined before creating the variable metric

#### Steps

1. Log in to Oracle Marketing.
2. Navigate to the Administration > Marketing > General > Metric.
3. Select **Create**.

4. Select category of Cost or Revenue.
5. Set Used with to the appropriate object type.
6. Set Calculation to 'Enter value manually', and set Accrual to Variable.
7. Select the multiplier metric from the LOV next to 'Multiplier Metric'.
8. Select summarize to parent, and same level as required.
9. Select **Create** to save and update your changes.

### 8.2.10 Implementing Formula Metrics

Using metric formulas you can measure the effectiveness of a marketing object based on a composite value calculated from different metrics. Using metrics in this way activity effectiveness is better understood by the marketing department.

Formula metrics:

- Calculate composite values from other metrics defined for the same object type.
- Can be used in the metrics side navigation menus for measuring the performance of various marketing objects.
- Will calculate as null if the dependent metrics are not assigned to the same object.
- Perform basic mathematical calculations including, addition, subtraction, multiplication, and division, along with a parentheses for grouping.
- Is defined by a unique name for a particular object type so that the calculations are consistent throughout the system for the same formula.
- Formulas can also be defined generically for object type 'Any'.

The sources of variables for the formula metrics type 'Any' are either categories or rollup and summary metrics.

For example, to define the ROI formula of type 'Any' the source values can be defined as the categories cost and revenue, then the ROI formula can be attached to all supported marketing objects, because there are no object specific dependencies. The category variable will total all the lower level metrics (manual, function, and rollups) within the same category. For a sub-category, only the metrics within the same subcategory are added. The variables within the formula are only from the metrics associated with the same object type. When a formula is added to an object the relevant metrics are automatically added.

Formula metrics calculate measures based on other metrics. This is an extension of the metrics calculation types. Formula metrics can be used in the metrics side navigation menus for measuring the performance of various marketing objects. A 'Formula Metrics' can calculate composite values from other metrics defined for the same object type. If the dependent metrics are not assigned to the same object the formula will calculate null. Formulas can perform basic mathematical calculations including, addition, subtraction, multiplication, and division, along with a parentheses for grouping.

A formula is defined with a unique name for a particular object type so that the calculations are consistent throughout the system for the same formula. Formulas can also be defined generically for object type 'Any'. The sources of variables for the formula metrics type 'Any' are either categories or rollup and summary metrics. For example, to define the ROI formula of type 'Any' the source values can be defined as the categories cost and revenue, then the ROI formula can be attached to all supported marketing objects, because there are no object specific dependencies. The category variable will total all the lower level metrics (manual, function, and rollups) within the same category. For a sub-category, only the metrics within the same subcategory are added. The variables within the formula are only from the metrics associated with the same object type. When a formula is added to an object the relevant metrics are automatically added.

To create metric formulas use the following procedure:

### Steps

1. Login as a user that has the Oracle Marketing Administrator responsibility.
2. Navigate to Administration > Marketing > General > Metrics.
3. Select **Create**.
4. In the Metrics definition page, enter the following details:
  - Name: Enter a logical name.
  - Enabled: Place a check in this checkbox to make this metric available.
  - Display Type: Choose a display type (either currency, integer, or percent) for this metric. For more information on display type, see [Section 8.1.5, "Understanding Metric Display Types"](#).
  - Category: Defaults to Cost. The Category determines the location of the formula metric within the end user interface. If a formula is associated with a Cost or Revenue category, then this formula is displayed within the Cost & Revenue side navigation menu. If the formula is associated with any

other category (Response, Lead, Opportunity, etc.), then this formula is displayed within the Metric side navigation menu of the end user interface.

- **Used With:** This drop down box displays the object that the formula metrics is associated with. Metrics sources used for a formula should be within the same object type as the formula metrics. The objects with which users can associate the formula metrics include- campaigns, campaign schedule, events, event schedules, one-off events and deliverables. You can also select “Any” to associate the formula metric to any object type
- **Aggregation:** Defaults to Summation. You can also choose Average as the Aggregation type to accurately indicate the type of metric aggregation.

---

**Note:** The Create page is generic for all metric types and some options, such as Aggregation, may not be applicable for all metric calculation types. For example, aggregation does not apply to formula metrics although it does appear in the Create page.

---

5. In the Calculation region select Calculate Using Formula. This selection is required for formula metrics.

The ‘Accrual Type’ section and the ‘Summarize To’ are not relevant for formula metric are grayed out on selecting the ‘Calculate Using Formula’ radio button.

6. Select **Create**.

7. In the Formula table enter the following details:

- **Remove:** Use this checkbox to remove a line item from the formula definition.
- **Source Type:** Use this drop down to select the type of source to be used for defining the formula .The option in this drop down include, Category, Metric, Number and Operator.
- **Source Name:** Use the flashlight LOV to select the name of the source. This will display the names of all the sources of type selected in the ‘Source Type’ field.

For example, if the user has selected metric from the source type drop down, the flashlight LOV displays all the metric. The columns within this LOV include Metrics Name, Calculation, Category, Used With and Description. This flashlight LOV would not be available for the operator

and number option of the 'Source Type' drop down. Note: In this release, six operators are supported: -, +, \*, /, (, and ).

- Sequence: Use this field to reorder the sequence of entries in the formula through this field. You can't reuse existing numbers within a sequence order.
8. Select **Update** to save your work and validate your formula.

When the Update button is clicked on the formula details page, the formula is validated. If the formula is valid then the following message appears.

- Formula is Valid.
- Total Responses/Target Group Count

If the formula is not valid, then the following message is displayed

- Formula is Invalid
- Display the formula with a "^ - Error - " that indicates the spot of the error

## 8.3 Administrating Metrics

See the following sections to administrate marketing metrics:

- [Section 8.3.1, "Associating Metrics to Marketing Objects"](#)
- [Section 8.3.2, "Running the Metrics Concurrent Program"](#)
- [Section 8.3.3, "Setting Up Metric Templates"](#)
- [Section 8.3.4, "Creating a Metric Template"](#)
- [Section 8.3.5, "Enabling Metric Templates"](#)
- [Section 8.3.6, "Using Metric Templates"](#)

### 8.3.1 Associating Metrics to Marketing Objects

You can create metrics for any object that exists in the Oracle Marketing application. After the metric has been created by the Administrator, the marketer will use the metric in association with the Campaign object being measured.

For example, if a Manual Metric called "total cost" has been created for the Campaign Object, a marketer will simply navigate to the Campaign Details page and select Metric. The Manual Metric "total cost" will be available and will be associated to the Campaign Object by the marketer.



### 8.3.2 Running the Metrics Concurrent Program

After implementing any type of metric, the concurrent manager for metrics must be set up. The Metrics Refresh Engine utilizes PL/SQL features to quickly, and correctly roll up values.

A check is made to see if any rollup metrics are missing. That is, a metric defined with a rollup parent, and the associated activity metric does not have a rollup parent.

- If so, the rollup is created and the activity metric is updated to point to the new rollup metric.
- Alternatively, if the rollup parent exists, the activity metric is update to point to the existing one.
- All activity metrics marked with a dirty flag (indicates values may not be correctly totaled) are read into memory.
- All parent activity metrics of the dirty metrics are also read into memory.
- Each node in the dirty tree is calculated from the leaf level up.
- Totals are kept in memory until the operation is completed.
- On completion, values are bulk updated into the activity metrics table and the dirty flag is reset.
- This process is broken into 2 parts: Rollups and Summaries.
- Update History is optionally performed as indicated by an input parameter.

The following steps are made in the refresh process:

#### **Prerequisites**

Metric is properly set up

#### **Steps**

1. Log in to Oracle Forms as Oracle Marketing Administrator.
2. Navigate to Applications > Functions > Setups > Concurrent Requests.
3. Select Submit a New Request.
4. Select the Concurrent Manager Program: AMS - Metrics refresh program.
5. Schedule the program to execute at least once daily.
6. Update History.

- Metric history records the activity metric records on a daily basis. History is recorded by the AMS: Metric Refresh Program only when the Update\_history flag is set to Yes.
  - The refresh must be executed on a daily basis for the history to be recorded. If Update\_History has been set to No, then no history will be recorded. The history is recorded for each metric as a single record for a given day. If the metric record is updated more than once in a day, only the last value of that day is recorded. If a metric is not updated on a given day then no history is recorded.
  - The history can be shown by the history section on the Metrics and Cost & Revenue side navigation menus. Select the Metric Name, Start and End dates, Interval Value Type (cumulative or incremental), then select View History to show a table of values and charts. Recording history is required for support of Business Intelligence for Marketing (BIM).
7. Save your work.

### 8.3.3 Setting Up Metric Templates

Metric templates enable you to standardize the metrics associated with a marketing activity. For example, you can define a metric template that automatically associates specific call center costs to all new telemarketing activities. To streamline template setup and administration, each template is associated to a single marketing activity type (e.g. email, telemarketing, direct mail) or a single marketing object type (e.g. Campaign, Campaign Schedule, Event, Event Schedule).

To understand and implement Metric Templates see the following sections:

- [Section 8.3.4, "Creating a Metric Template"](#)
- [Section 8.3.5, "Enabling Metric Templates"](#)
- [Section 8.3.6, "Using Metric Templates"](#)

### 8.3.4 Creating a Metric Template

To create a Metric Template use the procedure below:

#### **Prerequisites**

Metric is defined

## Steps

1. Log in to Oracle Marketing.

2. Navigate to Administration > Marketing > Metric Templates.

The Metric Template overview page opens, it contains a list of all metric templates defined on the system. On the overview page templates can be enable or disabled as required.

3. Select **Create**.

The Metric Template Create page opens, enter the following information:

- **Name:** Enter a name for the template. The metric name value must correlate with the marketing object it is associated with.
- **Enabled:** Select whether to have the template enabled on creation.
- **Description:** Enter a description for the template.
- **Associated With:** Select either Object Type or Custom Setup. A Metric Template can be associated with either a marketing object (campaigns, events etc.) or with a custom set-up. If the metric template is associated with a marketing object, all metrics added to the template would have the same used with.

If the metric template is associated with a custom set-up, all metric added to the template will have the same used with object as the custom set-up.

Existing templates, which refer more than one object type, are to be split into each object type. The Metrics and Custom Setups would be distributed according to the same Object Types to the new templates.

- **Association Name:** Use the flashlight icon to display a list of all the custom setups (in the case where you have selected *custom setup* in the Association Type drop down.) If you have selected *used with* in the association type drop-down, a list of all the object types (e.g. Campaign Schedules, Campaigns, etc.) is displayed when selecting the flashlight LOV.

4. Select **Create**.

5. In the Define Metrics table, select the set of metrics to include in the template.

- **Metric Name:** Using the flashlight icon search and select the metrics that will be part of this template.

- **Used With:** This shows what types of object the metrics can be assigned to. The associations include defining which object types or custom setups these metrics are assigned to on creation
  - **Enabled:** If enabling this template place a check in the enabled checkbox.
6. Select **Update** to save your work.

### 8.3.5 Enabling Metric Templates

Enabling occurs at each level of the metric template. The entire template is enabled or disabled, or with each metric individually. If the template is disabled then the associations and metrics within are ignored. If metrics are disabled within the template then those metrics are not assigned (at least because of this template, but another template still could assign that metric).

### 8.3.6 Using Metric Templates

Usage of a metric template is transparent to the marketer creating the business object. When the marketing object is created the metric templates are all searched to generate a composite list of metrics to assign. The metrics are required to have the same 'Used With' object type as the new business object. The metrics must be enabled at the metric definition. The template, association type, and included metric all must be enabled to assign the metric. If duplicates of a metric are found across the templates only one metric is assigned to the object.

For more information about using Metric Templates see the *Oracle Marketing User Guide*.

## 8.4 Seeded Metrics Reference

A number of commonly used marketing metrics, such as Total Cost, Total Revenue, Responses Count and Event Registrants, are included in with the deployment of the Oracle Marketing application. The following is a listing of the metrics which are selectable for association to specific marketing activities/objects.

**Table 8–3 Seeded Metrics**

| <b>Metric Name</b>                           | <b>Metric Id</b> | <b>Used With Object</b> | <b>Calculation Type</b> | <b>Category</b> | <b>Metric Parent Id</b> | <b>Summary Metric Id</b> |
|--|------------------|-------------------------|-------------------------|-----------------|-------------------------|--------------------------|
| Total Campaign Cost                          | 1                | Any                     | Summary                 | Cost            | -                       | -                        |
| Total Campaign Direct Cost                   | 2                | Any                     | Summary                 | Cost            | -                       | 1                        |
| Rolled-up Campaign Deliverable Cost          | 3                | Any                     | Rollup                  | Cost            | 3                       | 2                        |
| Rolled-up Campaign Event Cost                | 4                | Any                     | Rollup                  | Cost            | 4                       | 2                        |
| Rolled-up Campaign Cost                      | 5                | Any                     | Rollup                  | Cost            | 5                       | 57                       |
| Total Campaign Indirect Cost                 | 6                | Any                     | Summary                 | Cost            | -                       | 1                        |
| Total Campaign Revenue                       | 7                | Any                     | Summary                 | Revenue         | -                       | -                        |
| Rolled-up Campaign Revenue                   | 8                | Any                     | Rollup                  | Revenue         | 8                       | 62                       |
| Total Campaign Response                      | 9                | Any                     | Summary                 | Response        | -                       | -                        |
| Campaign Response                            | 10               | Campaign                | Manual                  | Response        | 11                      | 64                       |
| Rolled-up Campaign Response                  | 11               | Any                     | Rollup                  | Response        | 11                      | 64                       |
| Total Campaign Schedule Cost                 | 12               | Any                     | Summary                 | Cost            | -                       | -                        |
| Total Campaign Schedule Direct Cost          | 13               | Any                     | Summary                 | Cost            | -                       | 12                       |
| Rolled-up Campaign Schedule Deliverable Cost | 14               | Any                     | Rollup                  | Cost            | 14                      | 13                       |
| Rolled-up Campaign Schedule Event Cost       | 15               | Any                     | Rollup                  | Cost            | 15                      | 13                       |
| Direct Cost                                  | 16               | Campaign Schedule       | Manual                  | Cost            | 171                     | 57                       |
| Total Campaign Schedule Indirect Cost        | 17               | Any                     | Summary                 | Cost            | -                       | 12                       |
| Total Campaign Schedule Revenue              | 18               | Any                     | Summary                 | Revenue         | -                       | -                        |
| Revenue                                      | 19               | Campaign Schedule       | Manual                  | Revenue         | 8                       | 62                       |
| Total Campaign Schedule Response             | 20               | Any                     | Summary                 | Response        | -                       | -                        |

**Table 8–3 Seeded Metrics (Cont.)**

|   |    |                   |         |          |     |    |
|---|----|-------------------|---------|----------|-----|----|
| Response                                  | 21 | Campaign Schedule | Manual  | Response | 11  | 64 |
| Total Event Cost                          | 22 | Any               | Summary | Cost     | -   | -  |
| Total Event Direct Cost                   | 23 | Any               | Summary | Cost     | -   | 22 |
| Rolled-up Event Deliverable Cost          | 24 | Any               | Rollup  | Cost     | 24  | 22 |
| Rolled-up Event Campaign Cost             | 25 | Any               | Rollup  | Cost     | 25  | 23 |
| Rolled-up Event Cost                      | 26 | Any               | Rollup  | Cost     | 26  | 57 |
| Total Event Indirect Cost                 | 27 | Any               | Summary | Cost     | -   | 22 |
| Total Event Revenue                       | 28 | Any               | Summary | Revenue  | -   | -  |
| Rolled-up Event Revenue                   | 29 | Any               | Rollup  | Revenue  | 29  | 62 |
| Total Event Response                      | 30 | Any               | Summary | Response | -   | -  |
| Event Response                            | 31 | Event             | Manual  | Response | 32  | 64 |
| Rolled-up Event Response                  | 32 | Any               | Rollup  | Response | 32  | 64 |
| Total Event Schedule Cost                 | 33 | Any               | Summary | Cost     | -   | -  |
| Total Event Schedule Direct Cost          | 34 | Any               | Summary | Cost     | -   | 33 |
| Rolled-up Event Schedule Deliverable Cost | 35 | Any               | Rollup  | Cost     | 35  | 34 |
| Rolled-up Event Schedule Campaign Cost    | 36 | Any               | Rollup  | Cost     | 36  | 34 |
| Direct Cost                               | 37 | Event Schedule    | Manual  | Cost     | 172 | 57 |
| Total Event Schedule Indirect Cost        | 38 | Any               | Summary | Cost     | -   | 33 |
| Total Event Schedule Revenue              | 39 | Any               | Summary | Revenue  | -   | -  |
| Revenue                                   | 40 | Event Schedule    | Manual  | Revenue  | 29  | 62 |
| Total Event Schedule Response             | 41 | Any               | Summary | Response | -   | -  |
| Response                                  | 42 | Event Schedule    | Manual  | Response | 32  | 64 |

**Table 8–3 Seeded Metrics (Cont.)**

|                                 |    |             |            |            |    |    |
|---------------------------------|----|-------------|------------|------------|----|----|
| Total Deliverable Cost          | 43 | Any         | Summary    | Cost       | -  | -  |
| Total Deliverable Direct Cost   | 44 | Any         | Summary    | Cost       | -  | 43 |
| Creative Cost                   | 45 | Deliverable | Manual     | Cost       | -  | 57 |
| Other Cost                      | 46 | Deliverable | Manual     | Cost       | -  | 57 |
| Postage Cost                    | 47 | Deliverable | Manual     | Cost       | -  | 57 |
| Total Deliverable Indirect Cost | 48 | Any         | Summary    | Cost       | -  | 43 |
| Total Deliverable Revenue       | 49 | Any         | Summary    | Revenue    | -  | -  |
| Revenue                         | 50 | Deliverable | Manual     | Revenue    | -  | 62 |
| Total Deliverable Response      | 51 | Any         | Summary    | Response   | -  | -  |
| Response                        | 52 | Deliverable | Manual     | Response   | -  | 64 |
| Other Cost                      | 53 | Campaign    | Manual     | Cost       | 5  | 57 |
| Other Cost                      | 54 | Event       | Manual     | Cost       | 26 | 57 |
| Allocation                      | 55 | Campaign    | Allocation | Allocation | -  | -  |
| Total Cost                      | 56 | Any         | Summary    | Cost       | -  | -  |
| Total Direct Cost               | 57 | Any         | Summary    | Cost       | -  | 56 |
| Rolled-up Deliverable Cost      | 58 | Any         | Rollup     | Cost       | 58 | 57 |
| Rolled-up Event Program Cost    | 59 | Any         | Rollup     | Cost       | 59 | 57 |
| Rolled-up Cost                  | 60 | Any         | Rollup     | Cost       | 60 | 57 |
| Total Indirect Cost             | 61 | Any         | Summary    | Cost       | -  | 56 |
| Total Revenue                   | 62 | Any         | Summary    | Revenue    |    |    |
| Rolled-up Revenue               | 63 | Any         | Rollup     | Revenue    | 63 | 62 |
| Total Response                  | 64 | Any         | Summary    | Response   | -  | -  |
| Rolled-up Response              | 65 | Any         | Rollup     | Response   | 65 | 64 |
| Campaign Response               | 66 | Program     | Manual     | Response   | 65 | 64 |
| Other Cost                      | 67 | Program     | Manual     | Cost       | 60 | 57 |
| Allocation                      | 68 | Program     | Allocation | Allocation | -  | -  |
| Total One-Off Event Cost        | 69 | Any         | Summary    | Cost       | -  | -  |

**Table 8–3 Seeded Metrics (Cont.)**

|  |    |                   |          |               |     |    |
|--|----|-------------------|----------|---------------|-----|----|
| Total One-Off Event Direct Cost          | 70 | Any               | Summary  | Cost          | -   | 69 |
| Rolled-up One-Off Event Deliverable Cost | 71 | Any               | Rollup   | Cost          | 71  | 70 |
| Rolled-up One-Off Event Campaign Cost    | 72 | Any               | Rollup   | Cost          | 72  | 70 |
| Direct Cost                              | 73 | One-Off Event     | Manual   | Cost          | 173 | 57 |
| Total One-Off Event Indirect Cost        | 74 | Any               | Summary  | Cost          | -   | 69 |
| Total One-Off Event Revenue              | 75 | Any               | Summary  | Revenue       | -   | -  |
| Revenue                                  | 76 | One-Off Event     | Manual   | Revenue       | 174 | 62 |
| Total One-Off Event Response             | 77 | Any               | Summary  | Response      | -   | -  |
| Response                                 | 78 | One-Off Event     | Manual   | Response      | 175 | 64 |
| Total Leads                              | 81 | Any               | Summary  | Leads         | -   | -  |
| Rolled-up Campaign Leads                 | 82 | Any               | Rollup   | Leads         | 82  | 81 |
| Leads                                    | 83 | Campaign Schedule | Function | Leads         | 82  | 81 |
| Leads                                    | 84 | Event Schedule    | Function | Leads         | 86  | 81 |
| Leads                                    | 85 | One-Off Event     | Function | Leads         | 87  | 81 |
| Rolled-up Event Leads                    | 86 | Any               | Rollup   | Leads         | 86  | 81 |
| Rolled-up One-Off Event Leads            | 87 | Any               | Rollup   | Leads         | 87  | 81 |
| Total Opportunities                      | 91 | Any               | Summary  | Opportunities | -   | -  |
| Rolled-up Campaign Opportunities         | 92 | Any               | Rollup   | Opportunities | 92  | 91 |
| Opportunities                            | 93 | Campaign Schedule | Function | Opportunities | 92  | 91 |
| Opportunities                            | 94 | Event Schedule    | Function | Opportunities | 96  | 91 |



**Table 8–3 Seeded Metrics (Cont.)**

|                                       |     |                   |          |               |     |     |
|---------------------------------------|-----|-------------------|----------|---------------|-----|-----|
| Opportunities                         | 95  | One-Off Event     | Function | Opportunities | 97  | 91  |
| Rolled-up Event Opportunities         | 96  | Any               | Rollup   | Opportunities | 96  | 91  |
| Rolled-up One-Off Event Opportunities | 97  | Any               | Rollup   | Opportunities | 97  | 91  |
| Total Orders Amount                   | 101 | Any               | Summary  | Orders Amount | -   |     |
| Rolled-up Campaign Orders Amount      | 102 | Any               | Rollup   | Orders Amount | 102 | 101 |
| Orders Amount                         | 103 | Event Schedule    | Function | Orders Amount | 106 | 101 |
| Orders Amount                         | 104 | One-Off Event     | Function | Orders Amount | 107 | 101 |
| Orders Amount                         | 105 | Campaign Schedule | Function | Orders Amount | 102 | 101 |
| Rolled-up Event Orders Amount         | 106 | Any               | Rollup   | Orders Amount | 106 | 101 |
| Rolled-up One-Off Event Orders Amount | 107 | Any               | Rollup   | Orders Amount | 107 | 101 |
| Total Registrants                     | 121 | Any               | Summary  | Registrants   | -   | -   |
| Rolled-up Event Registrants           | 122 | Any               | Rollup   | Registrants   | 122 | 121 |
| Registrants                           | 123 | Event Schedule    | Function | Registrants   | 122 | 121 |
| Registrants                           | 124 | One-Off Event     | Function | Registrants   | 125 | 121 |
| Rolled-up One-Off Event Registrants   | 125 | Any               | Rollup   | Registrants   | 125 | 121 |
| Total Attendees                       | 131 | Any               | Summary  | Attendees     | -   | -   |
| Rolled-up Event Attendees             | 132 | Any               | Rollup   | Attendees     | 132 | 131 |
| Attendees                             | 133 | Event Schedule    | Function | Attendees     | 132 | 131 |
| Attendees                             | 134 | One-Off Event     | Function | Attendees     | 135 | 131 |
| Rolled-up One-Off Event Attendees     | 135 | Any               | Rollup   | Attendees     | 135 | 131 |

**Table 8–3 Seeded Metrics (Cont.)**

|   |     |                   |          |               |     |     |
|---|-----|-------------------|----------|---------------|-----|-----|
| Total Cancellations                     | 141 | Any               | Summary  | Cancellations | -   | -   |
| Rolled-up Event Cancellations           | 142 | Any               | Rollup   | Cancellations | 142 | 141 |
| Cancellations                           | 143 | Event Schedule    | Function | Cancellations | 142 | 141 |
| Cancellations                           | 144 | One-Off Event     | Function | Cancellations | 145 | 141 |
| Rolled-up One-Off Event Cancellations   | 145 | Any               | Rollup   | Cancellations | 145 | 141 |
| Total Orders Count                      | 151 | Any               | Summary  | Orders Count  | -   | -   |
| Rolled-up Campaign Orders Count         | 152 | Any               | Rollup   | Orders Count  | 152 | 151 |
| Rolled-up Event Orders Count            | 153 | Any               | Rollup   | Orders Count  | 153 | 151 |
| Rolled-up One-Off Event Orders Count    | 154 | Any               | Rollup   | Orders Count  | 154 | 151 |
| Orders Count                            | 155 | Campaign Schedule | Function | Orders Count  | 152 | 151 |
| Orders Count                            | 156 | Event Schedule    | Function | Orders Count  | 153 | 151 |
| Orders Count                            | 157 | One-Off Event     | Function | Orders Count  | 154 | 151 |
| Total Responses Count                   | 161 | Any               | Summary  | Response      | -   | -   |
| Rolled-up Campaign Responses Count      | 162 | Any               | Rollup   | Response      | 162 | 161 |
| Rolled-up Event Responses Count         | 163 | Any               | Rollup   | Response      | 163 | 161 |
| Rolled-up One-Off Event Responses Count | 164 | Any               | Rollup   | Response      | 164 | 161 |
| Responses Count                         | 165 | Campaign Schedule | Function | Response      | 162 | 161 |
| Responses Count                         | 166 | Event Schedule    | Function | Response      | 163 | 161 |
| Responses Count                         | 167 | One-Off Event     | Function | Response      | 164 | 161 |

**Table 8–3 Seeded Metrics (Cont.)**

|                                       |     |     |        |          |     |    |
|---------------------------------------|-----|-----|--------|----------|-----|----|
| Rolled-up Campaign Direct Cost        | 171 | Any | Rollup | Cost     | 171 | 57 |
| Rolled-up Event Direct Cost           | 172 | Any | Rollup | Cost     | 172 | 57 |
| Rolled-up One-Off Event Direct Cost   | 173 | Any | Rollup | Cost     | 173 | 57 |
| Rolled-up One-Off Event Revenue       | 174 | Any | Rollup | Revenue  | 174 | 62 |
| Rolled-up One-Off Event Response      | 175 | Any | Rollup | Response | 175 | 64 |
| Rolled-up Campaign Indirect Cost      | 176 | Any | Rollup | Cost     | 176 | 17 |
| Rolled-up Event Indirect Cost         | 177 | Any | Rollup | Cost     | 177 | 38 |
| Rolled-up One-Off Event Indirect Cost | 178 | Any | Rollup | Cost     | 178 | 74 |



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# Implementing and Administrating Data Mining

This topic group includes implementation and administration tasks for implementing the Oracle Marketing Data Mining functionality.

Topics include:

- [Section 9.1, "Data Mining Overview"](#)
- [Section 9.2, "Implementing Data Mining"](#)
- [Section 9.3, "Administrating Data Mining Functionality"](#)

## 9.1 Data Mining Overview

Data Mining is the process of discovering patterns and relationships in large amounts of data. These patterns and behaviors are used to predict the behavior of customers and prospects.

A marketer uses the data by building “models” which act as a set of rules used to predict the value of a specific customer attribute. The prediction is based on the known values of other attributes. Oracle Marketing is integrated out-of-the-box with Oracle9i Data Mining to build predictive models of customer behavior.

After installing Oracle Marketing, several implementation and administrative tasks must be performed to ensure that ODM is configured to fit your business needs.

Some tasks are required and others are optional. Optional procedures need only be performed if the functionality provided is required by your business processes.

## 9.2 Implementing Data Mining

A license for Oracle9i Data Mining is a prerequisite for using data mining functionality within Oracle Marketing. Upon installation of Oracle Marketing, data mining functionality is automatically implemented. In other words, there are no additional *required* implementation steps.

The implementation steps listed in this section are optional and only necessary if additional functionality is required by specific business processes. This section assumes that Oracle Marketing and Oracle Data Mining are installed on the same database instance. Additionally, this section assumes the following:

- Oracle Marketing is implemented
- Oracle9i Data Mining Release 2 (or higher) is implemented
- The seeded data sources reference information stored within:
  - Oracle Customer Model (Trading Community Architecture or TCA)
  - Interaction History
  - Order Management
  - Customer Intelligence

To perform optional implementation steps, see the following sections:

- [Section 9.2.1, "Registering Your ODM Password with Oracle Applications"](#)
- [Section 9.2.2, "Activating the Data Mining Concurrent Manager"](#)

- [Section 9.2.3, "Starting the ODM Monitor"](#)
- [Section 9.2.4, "Setting System Profiles"](#)
- [Section 9.2.5, "Running Data Mining Concurrent Programs"](#)

## 9.2.1 Registering Your ODM Password with Oracle Applications

Registering the Oracle Data Mining (ODM) schema with Applications Foundation allows ODM to programmatically fetch the ODM username and encrypted password, thus avoiding the security risk of maintaining this information in a property file.

During the installation process the ODM schema is registered as an external schema with Oracle Applications and a default database username (ODM) and password is assigned. For security reasons, you should change this password.

To change the password:

1. Log on as a user with System Administrator responsibility.
2. Navigate to Security > ORACLE > Register.
3. Use the flashlight icon to search for the ODM database user name.
4. Place your cursor in the Password field. Enter your new password.
5. Re-enter your password.
6. Click **OK**.

## 9.2.2 Activating the Data Mining Concurrent Manager

A concurrent manager is required exclusively for running data mining concurrent requests in order to avoid deadlock when multiple models or scoring runs are generated in parallel.

To activate the data mining concurrent manager:

1. Log into Oracle Applications as a user with the System Administrator responsibility.
2. Navigate to Concurrent > Manager > Administer.
3. Select Marketing Data Mining Manager.
4. Select **Activate**.

### 9.2.3 Starting the ODM Monitor

Each time the database is started, you must start the ODM Monitor that handles data mining requests.

To start the ODM Monitor:

1. Using SQL \*Plus, log in to the database and issue the following command:

```
exec odm.odm_start_monitor
```

2. For the ODM Monitor to start, verify that the “job\_queue\_processes” database parameter has a minimum value of 2.
3. If there is an abnormal shut down of the database, it is recommended to stop and re-start the ODM Monitor. To stop the ODM Monitor, log in to the database and issue the following command:

```
exec odm.odm_stop_monitor
```

### 9.2.4 Setting System Profiles

Set the following data mining system profiles as mandated by your business requirements.

**Table 9–1 Data Mining System Profiles**

| Option                              | Required | Level | Setting  | Effect/Limitation  |
|-------------------------------------|----------|-------|--|--|
| AMS : Data Mining ODM Debug Enabled | Optional | User  | Default value is No.<br><br>If set to Yes - debug is turned on<br><br>If set to No - debug is turned off | Enables debugging information to be written in the concurrent request log.<br><br>This is optional because turning on debug is optional. |

### 9.2.5 Running Data Mining Concurrent Programs

The data mining concurrent programs can be accessed by either logging into applications as System Administrator and navigating to Concurrent > Requests or by logging into Oracle Marketing as the Marketing Super User and navigating to Administration > Marketing > Analytics > Concurrent Requests.



Use the table below to run concurrent programs as mandated by your business requirements.

**Table 9–2 Data Mining Concurrent Programs**

| Concurrent Manager                   | Required | Responsibility                 | Description  |
|--------------------------------------|----------|--------------------------------|--|
| Workflow Background Process          | Yes      | System Administrator           | Parameters Form: <ul style="list-style-type: none"> <li>Item Type: AMS Data Mining - Build/Score/Preview</li> <li>Minimum Threshold: Leave blank.</li> <li>Maximum Threshold: Leave blank.</li> <li>Process Deferred: Yes</li> <li>Process Timeout: Yes</li> <li>Process Stuck: Yes</li> </ul> For the Workflow daemon to monitor data mining workflow requests, a frequency of 30 minutes should be sufficient. |
| AMS Expire Data Mining Models        | Optional | Oracle Marketing Administrator | Background process monitoring data mining models for expiration. A frequency of once a day should be sufficient.   |
| AMS Update Data Mining Party Details | Optional | Oracle Marketing Administrator | Updates detail information collected on parties. The frequency should be the same as the Customer Intelligence Model (BIC) Summary Extraction process.   |

For more information on BIC see *Oracle Customer Intelligence Implementation Guide Release 11.5.6*.

## 9.3 Administrating Data Mining Functionality

After implementing data mining, depending on your business requirements, several administrative procedures may need to be performed.

For more information see:

- [Section 9.3.1, "Seeded Model Types"](#)
- [Section 9.3.2, "Creating Custom Model Types"](#)
- [Section 9.3.3, "Defining Seeded Data Source Attributes"](#)
- [Section 9.3.4, "Creating new Data Sources for Data Mining"](#)

- [Section 9.3.5, "Creating Targets"](#)
- [Section 9.3.6, "Seeded Targets"](#)

### 9.3.1 Seeded Model Types

Oracle Marketing ships with seeded models. However, custom models can also be created. See [Section 9.3.2, "Creating Custom Model Types"](#) for more information on custom models. For more information on using the seeded model types, see the *Oracle Marketing User Guide*.

The following model types are seeded for data mining:

**Table 9–3 Data Mining Seeded Model Types**

| Seeded Model Type      | Purpose   |
|------------------------|---|
| Response               | Used to predict customers/prospects that are most likely to respond to your e-mail, telemarketing, or direct mail campaign.   |
| Loyalty /Retention     | Used to predict individuals or businesses that are most likely to defect from your organization. This type of model assists you in converting them to loyal customers.  |
| Custom                 | Used to predict the value of any customer attribute in TCA or in a user-defined data source. For example, you can set up a custom model that predicts financial risk based on a credit score attribute or a custom model to predict likelihood of high credit card balances vs. low balances. |
| Product Affinity       | Predicts the likelihood of purchasing a particular product. You can also use this model to predict propensity to buy within a given product category based on an analysis of all products in that category.   |
| Customer Profitability | Predicts the likelihood of a customer relationship being profitable.  |

### 9.3.2 Creating Custom Model Types

Oracle Marketing uses “predictive models” to predict future customer behavior. 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 or predict which customers are likely to buy a particular

product. The possible values for the target field would be yes or no (i.e., a binary outcome).

A *custom model* type can be created to predict the value of any customer data attribute in the Oracle TCA customer data model (or in any user-defined data source) for customer information. This feature enables users to model any binary (Yes/No) customer behavior.

For example, marketers can set up a custom model to predict financial risk (based on a credit score attribute or a custom model) to predict likelihood of high credit card balances.

To create custom model types, use the following procedures:

- [Section 9.3.2.1, "Add New Lookup Code"](#)
- [Section 9.3.2.2, "Restart HTTP Server"](#)
- [Section 9.3.2.3, "Verify New Model Type"](#)

### 9.3.2.1 Add New Lookup Code

To create a new lookup code for the custom Model type, use the following procedure:

#### Prerequisites

None

#### Steps

1. Log in to Oracle Forms with Oracle Marketing Administrator Responsibility.
2. Navigate to Setups > Lookups.
3. Add your new model type to the Lookup Type: AMS\_DM\_MODEL\_TYPE.
  - Code: Use this field to name the new model type.
  - Meaning: This will be the display name (in the Oracle Marketing drop-down menu) for the custom model type.
  - Description: Optional description of the custom model type.
4. Save your work.

### 9.3.2.2 Restart HTTP Server

Lookup types are cached in the HTTP Server. Therefore, after creating a new lookup type, you must restart the HTTP server to refresh the data. The exact procedures for this step will vary depending on your environment.

### 9.3.2.3 Verify New Model Type

In order to begin using a new model type, you will need to setup the target field that the new model type will be predicting.

To verify the new model type, use the procedure below:

#### Prerequisites

None

#### Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Analytics > Targets.
3. Select **Create**.
4. Select the Model Type LOV. The custom Model Type is visible in the drop-down menu.

## 9.3.3 Defining Seeded Data Source Attributes

Oracle Marketing ships with seeded data sources that are used by both list generation and data mining functionality. The seeded data sources are editable. By default, all attributes (or columns) associated with the seeded data source are active. As the administrator, you must deactivate fields you wish to exclude for list generation and data mining analysis.

To define the data source attribute details for data mining, you should do the following:

- Select the Data Mining Details view within the Attributes mid-tab of a data source.
- Check the “Use for Data Mining” column to select attributes to be used for data mining.

See [Appendix F, "Seeded Data Source and Data Source Attribute Reference"](#) for more information on seeded data sources and data source attributes.

### 9.3.4 Creating new Data Sources for Data Mining

Use the following procedure to create a new data source.

#### Prerequisites

None

#### Steps

1. Login as a user that has the Audience Administrator responsibility.
2. Navigate to Audience Dashboard > Audience Administration.
3. Select Create Data Source.
4. Fill in the following required fields:
  - Data Source Name: Enter a logical name for the parent data source.
  - Code: Enter a code, this is used as a reference for the data source when creating Discoverer Workbooks.
  - Type: Select Parent Data Source.
  - Category: Defines the type of data put into the list by categorizing the data source by type. Category selection is mandatory when creating parent data sources and optional when creating child data sources.

The following categories are seeded:

- Organization Contacts
  - Persons
  - Organization
- Table or View Name: Select the appropriate table or view that this data source points to. By selecting a view (given that a view has been created) you are able to narrow down the amount of data that this source will retrieve.
  - Unique Identifier: When creating data sources, if you are explicitly defining the relationship (between parent and child) up front, the unique identifier is critical.

This field allows you to set a default join condition between a parent and child data source. Specifying the join condition here enables the child and parent to be *explicitly* joined.

Although you can relate the parent and child at a later time (using the Related Data Sources mid-tab), if you know your parent/child relationships up front, you can join them in the data source creation phase.

- 5. Select **Apply**.  
The Update Data Source page opens.
- 6. In the View drop-down, choose Data Mining Details.
- 7. Place a check in the Use for Data Mining checkbox for every attribute you want to use for data mining.
- 8. Optionally, change the source field label.
- 9. If you want the application to automatically bin the data, select Auto Binning.
- 10. If you want to manually bin the data, uncheck the Auto Binning column. Select Apply and then select the Binning Details icon.

Enter the Number of Buckets to be used for the Manual Binning. You can then enter the bucket number and the value for each of these buckets.

In addition, you can also create manual bins within multiple values by specifying the multiple values (for the same bucket) in multiple lines. For example, to create two buckets with multiple values for an attribute of type VARCHAR, you can specify the following:

| Bucket Number | Value |
|---------------|-------|
| 1             | A     |
| 1             | E     |
| 1             | I     |
| 2             | B     |
| 2             | C     |

Select **Update** after you finish defining the manual bins.

- 11. If generating a list from the data mining results, then map the data source attributes to the corresponding list entries columns within the Map to List Entries column.
- 12. To display these columns within the Entries mid-tab for a list, check the Display in List Entries check box.

13. Select **Apply** to save your work.

### 9.3.5 Creating Targets

When marketers create predictive models, they are required to choose the model type and the target. As the administrator, you will need to set up the data sources and targets for the marketer. Terms are defined as follows:

- *Data Source*: A database table (or view) which is the source of data
- *Target*: Associates the data source, model type, and the target field. The target field is a column within the data source whose value you are trying to predict. See [Section 9.3.6, "Seeded Targets"](#) for a list of seeded targets.

For example, you might define a target called "Laser Printer Indicator". This target associates a specific model type (say, Product Affinity), a user-defined data source (B2B: Orders Data Mart), and a target field (a column within the corresponding data source). When a marketer chooses the Product Affinity model type and the "Laser Printer Indicator," they can then build a predictive model to determine who is likely to purchase a laser printer by mining data stored within the corresponding data source (in this case the "B2B: Orders Data Mart").

Oracle Marketing currently supports binary outcomes for the target field. As such, the possible values for a target field must either be binary or must be mapped to a binary outcome. For example, if you are trying to predict high-income households, then you will set up the "Income" target field such that values greater than 100000 is defined as the positive target (yes) and the other values are non-positive (no).

To create a Target use the following procedure:

#### Prerequisites

None

#### Steps

1. Log in to Oracle Marketing.
2. Navigate to Administration > Marketing > Analytics > Targets.
3. Select **Create**.
4. In the Create Targets page, enter the following information:
  - **Name**: Enter a name for the target. Choose a name that logically represents the customer behavior being predicted. For example, if creating a target to

predict customers who'll purchase a laser printer, then name the target as "Laser Printer Indicator".

- **Model Type:** Use the LOV to select the corresponding Model Type (Custom, Customer Profitability, Direct Mail Response, E-Mail Response, Loyalty/Retention, Product Affinity, or Telemarketing Response).
  - **Parent Data Source:** Use the LOV to select the parent data source.
  - **Child Data Source:** If the parent data source has child data sources, then these are displayed below the selected parent data source. Select the child data sources to be used for data mining analysis.
  - **Target Field:** Select the flashlight icon to launch the target field selector. The target field selector LOV displays the attributes of parent data source as well as any selected child data source. Choose the target field within the corresponding parent or child data source.
  - **Description:** Optionally, enter a description for the target.
5. In the Positive Target Values section specify the positive target value for this target field.
- **Condition:** Use this column to select a condition operator for the target field.
  - **Value:** Use this column to indicate a value for the condition selected. Certain conditions allow certain value inputs. For example, if the condition "=" is selected for the target field "Response", then an appropriate value could be "Yes". The text input is case sensitive and must match the value in the database exactly.  
  
 Note: In this example, if the value for "Response" in the database is "yes", then the positive value of "Yes" will not match the database value.
  - **Upper Value:** Use this column to indicate a upper value when "BETWEEN" is chosen as the condition operator. Only the BETWEEN operator requires a value in this column. For example, if using the target "household income" with the operator "BETWEEN" and a Value of "100000" and an Upper Value of "150000", then this would consider all household incomes between 100,000 and 150,000 to be positive target values. All other income values are considered non-positive. To build a valid predictive model, the data must contain positive and non-positive values.
  - **Value Description:** Use this column to give your values a text description.
6. Select Create to create your target field.



### 9.3.6 Seeded Targets

The following targets are seeded for release 11.5.10:

- B2C: Direct Mail Responders
- B2B: Direct Mail Responders
- B2C: E-mail Responders
- B2B: E-mail Responders
- B2C: Telemarketing Responders
- B2B: Telemarketing Responders
- B2C: Loyalty/Retention
- B2B: Loyalty/Retention
- B2C: Profitability
- B2B: Profitability
- B2C: Product Affinity
- B2B: Product Affinity



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## Implementing and Administrating Products, Price Lists, and Deliverables

This topic group describes concepts and procedures related to the implementation and administration of products, price lists, and deliverables in Oracle Marketing.

Topics include:

- [Section 10.1, "Implementing Products"](#)
- [Section 10.2, "Administrating Products"](#)
- [Section 10.3, "Implementing Price Lists"](#)
- [Section 10.4, "Implementing Deliverables"](#)

# 10.1 Implementing Products

Implementing products for marketing purposes provides marketer’s the ability to create, promote, and manage products. After you have properly implemented products, your end users can access products using the Campaign Workbench or the Campaign tab. For the purpose of marketing, products are usually associated with an offer, event, promotion, or deliverable.

Oracle Marketing requires that the following applications are properly implemented:

- [Section 10.1.1, "Implementing Oracle Product Lifecycle Management"](#)
- [Section 10.1.2, "Implementing Oracle Inventory for Marketing Products"](#)

## 10.1.1 Implementing Oracle Product Lifecycle Management

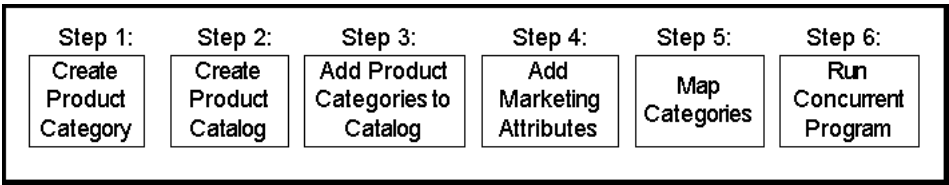
Oracle Marketing uses Oracle Product Lifecycle Management (PLM) for product cataloging and management. The concept of using a single product hierarchy model provides an efficient and re-usable catalog and product management system.

Using catalog categories you build a structured hierarchy that contains characteristics (such as attributes and functions). These characteristics are inherited throughout the hierarchy.

For example, you can create a catalog category *phone*. This category can have children *mobile phone* and *land line*. All children for the parent *phone* will inherit all characteristics defined for phone.

**Note:** Interest Types, primary and secondary codes are no longer used for product categorization.

**Figure 10–1   Setting Up the Product Catalog**



## Step 1: Create Product Catalog

A catalog is a collection of categories that are setup in a hierarchical format. When building your product catalog (and associated hierarchy), the first thing to do is create the catalog structure.

To create the catalog, use the following procedure:

### Steps

1. Login to Self Service as a user that has the Catalog Manager responsibility.
2. Navigate to Setup > Catalogs.
3. Select **Create Catalog**.
4. Fill in the following fields:
  - Name: Enter a name relevant to Marketing. For example, AMS Catalog.
  - Description: Provide a relevant description for this catalog. For example, marketing products catalog.
  - Controlled at: Select if you want the product catalog to be associated at the item or organization level.
  - Flex Structure: Select the appropriate flex structure for your implementation.
  - Default Category: Select the default category based on your implementation requirements.
5. Place a check in the following checkboxes:
  - Enable Hierarchy for Categories
  - Enforce a List of Valid Categories
6. Select **Apply**.

## Step 2: Create Product Categories

To create Product Categories use the following procedure:

### Prerequisites

You must add the following responsibilities to your user.

- Catalog Responsibility: Enables you to access the PLM UI also enables you to execute the Load Catalog Hierarchy concurrent program.

- **Inventory responsibility:** Enables you to access the Oracle Inventory UI and allows you to see the default category set UI.

### **Steps**

1. Login to Self Service as a user that has the Catalog Manager responsibility.
2. Navigate to Setup > Categories.
3. Select Create Categories.
4. In the flex structure field select Sales Categories.
5. Fill in mandatory fields.
6. Click **Apply**.

### **Step 3: Add Product Categories to Catalog**

In this step, you will add the product categories created above to the product catalog. While adding the categories to the catalog, the parent-child relationships are preserved. After creating the category you must associate it to the catalog created.

### **Steps**

1. Login to Oracle Forms as a user that has the Catalog Manager responsibility.
2. Navigate to the Catalog created in the previous step.
3. Select Categories.
4. Choose Add Category.
5. Use the Add Sub-category action to add sub-categories to existing categories.

### **Step 4: Add Marketing Attributes**

Product categories in the catalog have additional Sales and Marketing related attributes. These include:

- **Include in Forecast:** All product categories that can be forecasted against should have this flag set. This is similar to the forecastable flag in interest types in 11.5.9 and previous releases.
- **Expected Purchase:** All product categories that sales reps can log opportunity /lead lines against should have this flag set. This is similar to the expected purchase flag on interest types in 11.5.9 and previous releases.

- **Exclude From User View:** Some product categories may be in the catalog for purely reporting and collection purposes. Such product categories should have this flag set. The product hierarchy presented to sales reps will ignore these categories. These can however be used by analytical and reporting tools such as DBI.

To setup these attributes, use the following procedure:

1. Switch to Catalog Manager responsibility.
2. Navigate to the Catalog previously created (you can click on the catalog name in the catalog search.)
3. Choose Categories.
4. Select the category name you wish to set the attributes for.
5. Choose Attributes.
6. Update the attributes as desired.
7. Attach the product reporting functional area, using the following procedure:
  - a. Login to Oracle Forms as a user that has the Oracle Marketing Administrator responsibility.
  - b. Navigate to Inventory > Setup > Items > Categories > Default Category Sets.
  - c. Attach the functional area Product Reporting to the catalog (i.e, category set) as created above.
8. Next, run **Load Catalog Hierarchy** from the Catalog Manager responsibility.  
 This enables the categories defined above are made visible to the Marketing applications. Only categories with the following parameters will be pulled into this view:
  - FORECASTABLE\_FLAG = Y
  - PURCHASE\_INTEREST = Y
9. Login to Oracle Forms as a user that has the Catalog Manager responsibility.
10. Select View > Requests.
11. Select Submit a New Request.
12. In the Submit Request form, specify the request Load Catalog Hierarchy, specify the Refresh Mode and choose Submit.

### Step 5: Viewing Marketing Categories

To see a list of categories used for marketing (to manually map) you will need to run the following script:

- AMSUPCMP.sql

This script is located in the Product Top directory (shown below):

- ProductTop/patch/11.5/sql

### Step 6: Mapping Marketing Categories

After viewing the list of categories for Marketing, you will map them to the catalog previously created.

To access PLM UI for Mapping use the following procedure:

1. Log to the SSWA Using Catalog manager responsibility.
2. Navigate to Setup -> Setup Workbench
3. Navigate to Catalog Tab.
4. Select "Catalog Category Mapping", Use the UI for mapping the categories.

### Step 7: Run Concurrent Program

Once categories are mapped, run **AMS Upgrade Product Categories** to migrate marketing data.

## 10.1.2 Implementing Oracle Inventory for Marketing Products

Oracle Product Lifecycle Management handles product cataloging and change management for Oracle Marketing. Oracle Inventory acts as the physical repository for products.

You can create 2 different types of products using inventory:

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

To implement products use the following procedure:

- [Section 10.1.3, "Validating Inventory Organization for Products"](#)
- [Section 10.1.4, "Setting System Profiles for Products"](#)



- Section 10.1.5, "Validating Item Validation Organization"
- Section 10.1.6, "Creating and Verifying lookups for Products"
- Section 10.1.7, "Running Concurrent Programs for Products"
- Section 10.1.8, "Recompiling Key Flexfield Segments"

### 10.1.3 Validating Inventory Organization for Products

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

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

### 10.1.4 Setting System Profiles for Products

Set the following profile option for Products:

**Table 10–1 Product Profile Options**

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

### 10.1.5 Validating Item Validation Organization

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

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

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

If the two Item Validation Organization profile options do not match at the same levels, then the Create Product button will not be display in the Store Administration UI's Catalog > Products menu. However, the iStore administrator still will have view and update privileges for Products within the inventory organization of the IBE: Item Validation Organization profile option at its lowest-level setting.

### 10.1.6 Creating and Verifying lookups for Products

Use the following Lookups for Products:

**Table 10–2 Lookups for Products**

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

### 10.1.7 Running Concurrent Programs for Products

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

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

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

**Table 10–3   Profile Option for Products**

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

### 10.1.8 Recompiling Key Flexfield Segments

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

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

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

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

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

## 10.2 Administering Products

See the following sections to administer products:

- [Section 10.2.1, "Administering Product Templates"\]](#)
- [Section 10.2.2, "Creating a New Product or Service Template"](#)
- [Section 10.2.3, "Setting up the New Template"](#)
- [Section 10.2.4, "Selecting Product Attributes in Seeded Product Templates"](#)

### 10.2.1 Administering Product Templates

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

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

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

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

Logical process of creating templates:

1. Create Product Templates - choose Service or Product Type.
2. Associate responsibility to the template.
3. For each product attribute select whether the attribute is defaulted, editable or hidden.

4. Depending on the responsibility of the user creating the product the templates associated to that responsibility will be implemented. If no templates are associated to the user, the default-seeded template is used.

## 10.2.2 Creating a New Product or Service Template

To create a new template use the following procedure:

1. Log in to Oracle Marketing.
2. Navigate to Administration > Setup > Product Option.
3. Select **Create Product Template**.
4. In the Create Product Template screen, enter the following:
  - Template Name: Enter a unique, descriptive name for the template.
  - Type of template: Select the radio button for either a Product or Service template. When selecting a type, the PRODUCT\_SERVICE\_FLAG flag from AMS\_PROD\_TEMPLATES\_B which will have value P/S. Depending upon the value, meaning it is retrieved from the ak\_region\_items/\_tl.
  - Description: Optionally, enter a description for the template.
5. Select **Apply** to save your work.

## 10.2.3 Setting up the New Template

Set up the new template as follows:

1. Log in to Oracle Marketing.
2. Navigate to Administration > Setup > Product Option.
3. Select the hyperlink of the new template in the Product Templates screen.
4. In the Responsibilities block, select the flashlight icon to retrieve the Marketing responsibility which will link to the template. Only one product template and one service template can be assigned to a responsibility.

Optionally, remove an assignment.

5. In the Attributes block, set the following parameters for each attribute.
  - Default: Select this to make an attribute the default when a product is created.

- Editable: Select this to make an attribute updatable in the product screens. This field overrides the Hide field. If you select Editable, Hide is ignored.
- Hide: Select this to make the attribute hidden in the product screens. This is overridden by a selected Editable parameter.
- Select All: Select this flag to enable all the attributes belonging to a selection default and edit enabled.

6. Select **Apply** to save your work.

### 10.2.4 Selecting Product Attributes in Seeded Product Templates

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

- Product (Inventory) Template
- Service Template

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

## 10.3 Implementing Price Lists

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

Events and Deliverables that are created as inventory items can be added to a price list. Price lists can be attached to Offers as qualifiers so that customers can get a discount on a specific price.

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

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

- [Section 10.3.1, "Setting System Profile Options for Price Lists"](#)
- [Section 10.3.2, "Creating and Verifying Lookups for Price Lists"](#)

### 10.3.1 Setting System Profile Options for Price Lists

Set the following profile options for price lists:

**Table 10–4    Price List Profile Options**

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

### 10.3.2 Creating and Verifying Lookups for Price Lists

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

**Table 10–5    Lookups for Price Lists**

| Key                   | Type   | Values  | Meanings  |
|-----------------------|--------|---|---|
| AMS_PRICE_LIST_STATUS | System | Active<br>Draft<br>Rejected<br>Pending<br>Cancelled | Active<br>Draft<br>Rejected<br>Pending Budget Approval<br>Cancelled |



## 10.4 Implementing Deliverables

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

To implement Deliverables in Oracle Marketing follow these procedures:

- [Section 10.4.1, "Setting System Profile Options for Deliverables"](#)
- [Section 10.4.2, "Creating and Verifying Lookups for Deliverables"](#)

### 10.4.1 Setting System Profile Options for Deliverables

Set the following profile options for Deliverables:

**Table 10–6 Profile Options for Deliverables**

| Option  | Required | Level | Setting                               | Effect/Limitation   |
|---|----------|-------|---------------------------------------|---|
| AMS: Item Validation Master Organization      | Yes      | Site  | A valid Master Inventory Organization | When a Deliverable is flagged as an inventory item, it is created in Inventory under the specified master organization. |
| AMS: Should Call to Inventory Modules be Made | Yes      | Site  | Yes/No                                | Indicates whether a Deliverable may be created as an Oracle Inventory item.   |
| AMS: Should Call to Pricing Modules be Made   | Yes      | Site  | Yes/No                                | Indicates whether a Deliverable may be priced.  |

### 10.4.2 Creating and Verifying Lookups for Deliverables

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

**Table 10–7 Lookups for Deliverables**

| <b>Key</b>            | <b>Type</b> | <b>Values</b>   | <b>Meanings</b>   |
|-----------------------|-------------|---|---|
| AMS_DELIV_STATUS      | User        | Archived<br>Available<br>Cancelled<br>Denied_BA<br>New<br>Submitted_BA<br>Superseded<br>Expired<br>Denied_TA<br>Budget_Appr<br>Submitted_TA | Archived<br>Available<br>Cancelled<br>Denied - Budget Approval<br>New<br>Submitted - Budget Approval<br>Superseded<br>Expired<br>Denied - Concept Approval<br>Budget Approved<br>Submitted - Concept Approval |
| AMS_EVENT_FULFILL_ON  | System      | On_Cancel<br>On_Enroll<br>On_Reg  | On Cancellation<br>On Enrollment<br>On Registration   |
| AMS_CAMP_FULFILL_ON   | System      | On_Invite   | On Invite   |
| AMS_OBJECT_USAGE_TYPE | System      | Created<br>Used_By  | Created<br>Used By  |

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# Implementing Marketing Intelligence

This topic group includes implementation and administration tasks for implementing Oracle Marketing's marketing intelligence functionality.

Topics include:

- [Section 11.1, "Marketing Intelligence Overview"](#)
- [Section 11.2, "Implementing Marketing Intelligence"](#)
- [Section 11.3, "Implementing Lead Intelligence"](#)

## 11.1 Marketing Intelligence Overview

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

Marketing intelligence displays the following:

- **Most Recent Bins:** Display links to recently accessed campaigns and events. The links are generated automatically when you create or edit a campaign or event. The links navigate you to the details page for the object type. Most Recent bins are available for campaign and event objects.
- **Reporting Bins:** Display trend performance information for key marketing activities. Some examples include campaign effectiveness, event effectiveness, and marketing budgets. Each reporting bin contains links to more granular detailed reports.
- **Reports:** Displayed directly on the homepage are drill-down reports linked from a reporting bin, but with a configurable date range specified by the user. The date aggregate for the report is inherited from the calling bin. For example, when drilling down on the month of September, all data for the drilldown reports is about September.
- **Charts:** Display trend performance information for key marketing activities. They illustrate information based on date ranges specified by the user. In Oracle Marketing, charts render the top comparisons. For example, if you are viewing a Campaigns by Leads chart and the number of rows to display is 10, then the chart for Campaigns by Leads will show the Top 10 Campaigns by Leads.

For more information on using Bins, Reports and Charts see the *Oracle Marketing User Guide*.

## 11.2 Implementing Marketing Intelligence

This section describes how to implement Marketing Intelligence functionality displayed on the homepage of the Oracle Marketing. This includes the Bins, Charts and Reports. Displaying the following marketing objects is covered in this section:

- Campaigns
- Events
- Budgets
- Key performance indicators

- Marketing activities
- Interaction history responses

See the following procedures to implement Marketing Intelligence:

- [Section 11.2.1, "Setting System Profile Options for Marketing Intelligence"](#)
- [Section 11.2.2, "Defining Marketing Calendar Periods"](#)
- [Section 11.2.3, "Implementing Lookups for Marketing Intelligence"](#)
- [Section 11.2.4, "Defining Exchange Rates"](#)
- [Section 11.2.5, "Loading Marketing Facts for a First Time Build"](#)
- [Section 11.2.6, "Creating Initial Build of Materialized Views"](#)
- [Section 11.2.7, "Refreshing Materialized View for Campaigns, Events, and Budgets"](#)
- [Section 11.2.8, "Loading Marketing Facts From a Previous Refresh Date"](#)

## 11.2.1 Setting System Profile Options for Marketing Intelligence

Set the following system profiles for Marketing Intelligence.

**Table 11–1 Marketing Intelligence Profile Options**

| Option                  | Required | Level  | Setting   |
|-------------------------|----------|--------|---|
| BIM Month Period Type   | Yes      | System | Select the month period type corresponding to the Marketing Calendar.   |
| BIM Quarter Period Type | Yes      | System | Select the quarter period type corresponding to the Marketing Calendar. |
| BIM Year Period Type    | Yes      | System | Select the year period type corresponding to the Marketing Calendar.    |

## 11.2.2 Defining Marketing Calendar Periods

The calendar periods must be defined for the Marketing Calendar for the fiscal year containing the date one year prior to the start date. The Start Date is the first date for which data in the Bins, Charts and Reports should be displayed. Also define the periods: Month, Quarter and Year.

Identify the Calendar associated with the profile **AMS : Marketing Calendar** and define Periods on this calendar for the Fiscal Year, which contains the date one year

prior to the start date of the first time facts load, to the current Fiscal Year. It is required that periods of type Month, Quarter, and Year should be defined.

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

**Prerequisites**

None

**Steps**

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

**11.2.3 Implementing Lookups for Marketing Intelligence**

This procedure is only necessary if using the Web response interface public APIs: AMS\_RESP\_REJECT\_REASON and AMS\_RESP\_GRADE.

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

**Table 11–2 Lookups for Marketing Intelligence - Web Responses**

| Key                    | Type | Values       | Meanings                                |
|------------------------|------|--------------|---|
| AMS_RESP_REJECT_REASON | User | User Defined | Organization defined rejection reasons. |
| AMS_RESP_GRADE         | User | User Defined | Organization defined response grades.   |

## 11.2.4 Defining Exchange Rates

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

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

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

### Prerequisites

None

### Steps

1. Log into Forms for General Ledger Super User responsibility.
2. Navigate to Setup > Currencies > Rates > Daily.
3. Click Enter by Date Range to enter a range of dates the rate is applicable.
4. Select the From and To currencies.
5. Enter a From date and a To date.
6. Set the type equal to the type specified in the profile **AMS : Currency Conversion Type**.
7. Save your work.

## 11.2.5 Loading Marketing Facts for a First Time Build

Execute this Request Set only for the first time load. The Request for a first time build consists of 8 concurrent programs.

Use the following procedure to run a request set:

### Prerequisites

None

## Steps

1. Log in to Oracle Marketing as Marketing Intelligence Collection Manager.
2. Navigate to Requests > Run.
3. Select the Request Set Radio button and click OK.
4. Choose BIM: Load Marketing facts for the first time from the LOV. The Program block will list the concurrent programs in this request set. When programs are first listed, the Parameters column is blank for all programs.
5. Click on the Parameter column of the first row.
6. The system displays a Parameter window, where all the parameters are defaulted automatically.
7. Change the dates as desired and click **OK**.

The Start and End dates are defaulted to the sysdate. The Start Date should be the first date for which data should be shown.

8. Click on the Parameter column of the second row.
9. The system displays a Parameter window with all the parameters defaulted automatically to the values entered in the first row.
10. Click on the Parameter column of the third row.
11. The system displays a Parameter window with all the parameters defaulted automatically to the values entered in the previous row.
12. Click **Submit**.

The Request set will run and execute all the above concurrent programs sequentially.

**Table 11–3 Request Set: Loading Marketing Facts for a First Time Build**

| Sequence | Concurrent Program      | Parameters   | Est Time | Comments   |
|----------|-------------------------|--|----------|--|
| 0        | BIM: Truncate all facts | Objects (select from: All, Campaigns, Events, Budgets, Leads, Lead Import, Response) |          | This program removes all previously loaded facts. It should be used only when the data should be removed in its entirety |



**Table 11–3 Request Set: Loading Marketing Facts for a First Time Build (Cont.)**

| Sequence | Concurrent Program                           | Parameters   | Est Time        | Comments                 |
|----------|--|--|-----------------|--------------------------|
| 1        | BIM: Load Marketing Facts for the First Time | Object to Load: Campaign<br>Start Date: 01-SEP-00<br>End Dates: (SYSDATE)    | 2 Hrs., 15 Mins | Loads all Campaign Facts |
| 2        | BIM: Load Marketing Facts for the First Time | Object to Load: Event<br>Start Date: 01-SEP-00<br>End Dates: (SYSDATE)       | 6 Mins          | Loads all Event Facts    |
| 3        | BIM:Load Marketing Facts for the First Time  | Object to Load: Budget<br>Start Date: 01-SEP-00<br>End Dates: (SYSDATE)      | 20 Mins         | Loads all Budgets Facts  |
| 4        | BIM:Load Key Performance Indicator Facts     |  | 1 Min           | Loads KPI facts          |
| 5        | BIM: Load Marketing Facts for the First Time | Object to Load: Leads<br>Start Date: 01-SEP-00<br>End Dates: (SYSDATE)       | 30 Mins         | Loads Lead Facts         |
| 6        | BIM: Load Marketing Facts for the First Time | Object to Load: Lead_Import<br>Start Date: 01-SEP-00<br>End Dates: (SYSDATE) | 7 Mins          | Loads Lead Import Facts  |
| 7        | BIM:Load Marketing Facts for the First Time  | Object to Load: Response<br>Start Date: 01-SEP-00<br>End Dates: (SYSDATE)    | 5 Mins          | Loads Web Response Facts |

### 11.2.6 Creating Initial Build of Materialized Views

Execute this Request Set only for the first time. This prepares the pre-built tables for all materialized views. This program has to be run only once and should not be run during subsequent loads.

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

### Prerequisites

None

### Steps

1. Log in to Oracle Forms as Marketing Intelligence Collection Manager.
2. Navigate to Requests > Run.
3. Select the Request Set Radio button and click **OK**.
4. Choose BIM: Initial build of Materialized Views from the LOV. The Program block will list the concurrent programs listed below. The Parameters column is blank for all the programs.
5. Click on the Parameter column of the first row.
6. The system displays a Parameter window, where the parameter, Number of Parallel Processors, is defaulted automatically to 8. Change the value for this parameter to 4 and click OK.

Four processors is sufficient to run this Request Set.

7. Click on the Parameter column of the second row. The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4.
8. Repeat the steps 5 and 6 for the third and fourth rows.
9. After verifying all the parameters, click **Submit**.

The Request set will run and execute all the above concurrent programs sequentially:

**Table 11–4 Request Set: BIM: Initial Build of Materialized Views**

| Seq | Concurrent Program  | Parameters                       | Est Time | Comments  |
|-----|---|----------------------------------|----------|---|
| 1   | BIM: Initial build of Campaigns Materialized Views                    | Number of Parallel Processors: 4 | 1 Min    | Prepares pre-built tables for Campaigns Materialized views                    |
| 2   | BIM: Initial build of Events Materialized Views                       | Number of Parallel Processors: 4 | 1 Min    | Prepares pre-built tables for Events Materialized views                       |
| 3   | BIM: Initial build of Budgets Materialized Views                      | Number of Parallel Processors: 4 | 1 Min    | Prepares pre-built tables for Budgets Materialized views                      |
| 4   | BIM: Initial build of Key Performance Indicators Materialized Views   | Number of Parallel Processors: 4 | 1 Min    | Prepares pre-built tables for Key Performance Indicators Materialized views   |
| 5   | BIM: Initial Build of Interaction History Response Materialized Views | --                               | 1 Min    | Prepares pre-built tables for Interaction History Response Materialized views |

### 11.2.7 Refreshing Materialized View for Campaigns, Events, and Budgets

The Request set: BIM: Refresh Materialized Views, builds the materialized views for Campaigns, Events, Budgets, Key Performance Indicators and Marketing Activities.

This Request Set should be run only after the facts are loaded, either by the Request Set: BIM: Load Marketing facts for the first time or by Request Set: BIM: Load Marketing facts from the previous refresh date.

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

#### Prerequisites

None

#### Steps

1. Log in to Oracle Forms as Marketing Intelligence Collection Manager.
2. Navigate to Requests > Run.
3. Select the Request Set Radio button and click **OK**.
4. Select BIM: Refresh Materialized Views from the LOV.

The Program block will display the concurrent programs listed in the table below. Note that the Parameters column is blank for all the programs.

5. Click on the Parameter column of the first row.
6. The system displays a Parameter window, where the parameter Number of Parallel Processors is defaulted automatically to 8.
7. Change the value for this parameter to 4 and click **OK**.
8. Click on the Parameter column of the second row. The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4.
9. Repeat steps 8 and 9 for third, fourth, and fifth rows.
10. After verifying all the parameters, click **Submit**.

The Request set will run and execute all the above concurrent programs sequentially.

### 11.2.8 Loading Marketing Facts From a Previous Refresh Date

This request set will load all the marketing facts from the previous refresh date. Execute this Request Set on a daily basis. This program has to be run each time facts are loaded or refreshed.

#### Prerequisites

Marketing facts are properly implemented

#### Steps

1. Log in to Oracle Forms as Marketing Intelligence Collection Manager.
2. Navigate to Requests > Run.
3. Select the Request Set Radio button and click **OK**.
4. Select BIM: Load Marketing facts from previous refresh date from the LOV. The Program block will display the concurrent programs listed below.
5. Click on the Parameter column of the first row.
6. The system displays a Parameter window, where all the parameters are defaulted automatically.
7. Note that the End date is defaulted to the sysdate. Change the date as desired and click **OK**.

8. Click on the Parameter column of the second row.
9. The system displays a Parameter window with all the parameters defaulted automatically. Note that the end date is defaulted to the value entered in the first row. Change the date as desired and click **OK**.
10. Click on the Parameter column of the third row.
11. The system displays a Parameter window with all the parameters defaulted automatically.

---

**Note:** The end date is defaulted from the value entered in the first row. Change the date as desired and click OK.

---

12. After verifying all the parameters, click **Submit**. The Request Set will run and execute all the above concurrent programs sequentially.
13. Note: that this program has to be run on a daily basis.
14. Run the Request Set: BIM: Refresh Materialized Views, above, to build the materialized views following the steps instructions listed above.

**Table 11–5 Request Set: BIM Load Marketing Facts from a Previous Refresh Date**

| Seq | Concurrent Program   | Parameters                                      | Est Time | Comments                 |
|-----|--|---|----------|--------------------------|
| 1   | BIM: Load Marketing Facts from previous refresh date                 | Object to Load: Campaign<br>End Date: (SYSDATE) | 5 Mins   | Loads all Campaign Facts |
| 2   | BIM: Load Marketing Facts from previous refresh date                 | Object to Load: Event<br>End Date: (SYSDATE)    | 5 Mins   | Loads all Events Facts   |
| 3   | BIM: Load Marketing Facts from previous refresh date                 | Object to Load: Budget<br>End Date: (SYSDATE)   | 5 Mins   | Loads all Budget Facts   |
| 4   | BIM: Load Key Performance Indicator facts from previous refresh date |   | 5 Mins   | Loads all KPI Facts      |

**Table 11–5 Request Set: BIM Load Marketing Facts from a Previous Refresh Date (Cont.)**

| Seq | Concurrent Program                                   | Parameters  | Est Time | Comments                 |
|-----|--|---|----------|--------------------------|
| 5   | BIM: Load Marketing Facts from previous refresh date | Object to Load: Leads<br>End Date (SYSDATE)       | 5 Mins   | Loads Lead Facts         |
| 6   | BIM: Load Marketing Facts from previous refresh date | Object to Load: Lead_Import<br>End Date (SYSDATE) | 5 Mins   | Loads Lead Import Facts  |
| 7   | BIM: Load Marketing Facts from previous refresh date | Object to Load: Response<br>End Date (SYSDATE)    | 5 Mins   | Loads Web Response Facts |

## 11.3 Implementing Lead Intelligence

This section describes how to implement Lead Intelligence functionality that is displayed on the homepage of the Oracle Marketing. This section covers how to display the following marketing objects on the homepage:

- Leads
- Lead Import
- Web Surveys

See the following procedures to implement Lead Intelligence:

- [Section 11.3.1, "Creating Initial Build of Materialized View for Lead Intelligence"](#)
- [Section 11.3.2, "Refreshing Materialized Views for Lead Intelligence"](#)
- [Section 11.3.3, "Loading Marketing Facts from Previous Refresh Date"](#)

### 11.3.1 Creating Initial Build of Materialized View for Lead Intelligence

Execute this Request Set only for the first time. This prepares the pre-built tables for all materialized views for Lead Intelligence. This program has to be run only once and should not be run during subsequent loads.

#### Prerequisites

None

## Steps

1. Log in to Oracle Forms as Marketing Intelligence Collection Manager.
2. Navigate to Requests > Run.
3. Select the Request Set Radio button and click **OK**.
4. Choose BIM: Initial build of Materialized Views from the LOV.

The Program block will display the concurrent programs listed in the table below. Note that the Parameters column is blank for all the programs.

5. Click on the Parameter column of the first row.
6. The system displays a Parameter window, where the parameter, Number of Parallel Processors, is defaulted automatically to 8. Change the value for this parameter to 4 and click **OK**.

Four processors is sufficient to run this Request Set.

7. Click on the Parameter column of the second row. The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4.
8. Repeat the steps 5 and 6 for the third and fourth rows.
9. After verifying all the parameters, click **Submit**.

The Request set will run and execute all the above concurrent programs sequentially.

**Table 11–6 Request Set BIM: Initial Build of Materialized Views for Lead Intelligence**

| Seq | Concurrent Program                                    | Parameters                       | Est Time | Comments  |
|-----|---|----------------------------------|----------|---|
| 1   | BIM: Initial build of Lead KPI Materialized Views     | Number of Parallel Processors: 4 | 1 Min    | Prepares pre-built tables for Lead KPI Materialized views     |
| 2   | BIM: Initial build of Lead Quality Materialized Views | Number of Parallel Processors: 4 | 1 Min    | Prepares pre-built tables for Lead Quality Materialized views |
| 3   | BIM: Initial build of Lead Sources Materialized Views | Number of Parallel Processors: 4 | 1 Min    | Prepares pre-built tables for Lead Sources Materialized views |
| 4   | BIM: Initial build of Lead Import Materialized Views  | Number of Parallel Processors: 4 | 1 Min    | Prepares pre-built tables for Lead Import Materialized views  |
| 5   | BIM: Initial Build of Responses Materialized Views    | Number of Parallel Processors: 4 | 1 Min    | Prepares pre-built tables for Responses Materialized views    |

**Table 11–7 Request Set: BIM: Refresh Materialized View**

| Seq | Concurrent Program  | Parameters                       | Est Time | Comments   |
|-----|---|----------------------------------|----------|--|
| 1   | BIM: Refresh of Campaign Materialized views                     | Number of Parallel Processors: 4 | 10 Mins  | Builds Campaign Materialized views                     |
| 2   | BIM: Refresh of Events Materialized views                       | Number of Parallel Processors: 4 | 5 Mins   | Builds Events Materialized views                       |
| 3   | BIM: Refresh of Budgets Materialized views                      | Number of Parallel Processors: 4 | 20 Mins  | Builds Budgets Materialized views                      |
| 4   | BIM: Refresh of Key Performance Indicator Materialized views    | Number of Parallel Processors: 4 | 5 Mins   | Builds Key Performance Indicators Materialized views   |
| 5   | BIM: Refresh of Marketing Activities Materialized views         | Number of Parallel Processors: 4 | 5 Mins   | Builds Marketing Activities Materialized views         |
| 6   | BIM: Refresh of Interaction History Response Materialized views | Number of Parallel Processors: 4 | 5 Min    | Builds Interaction History Response Materialized views |

### 11.3.2 Refreshing Materialized Views for Lead Intelligence

Builds the Materialized views for Leads, Lead Import and Web Responses. This Request Set should be run only after the facts are loaded, either by the Request Set: BIM: Load Marketing facts for the first time or by Request Set: BIM: Load Marketing facts from the previous refresh date. This program has to be run each time facts are loaded or refreshed.

#### Prerequisites

None

#### Steps

1. Log in to Oracle Forms as Marketing Intelligence Collection Manager.
2. Navigate to Requests > Run.
3. Select the Request Set Radio button and click **OK**.
4. Select BIM: Refresh Materialized Views from the LOV.

The Program block will display the concurrent programs listed below.

5. Click on the Parameter column of the first row.



6. The system displays a Parameter window, where the parameter Number of Parallel Processors is defaulted automatically to 8.
7. Change the value for this parameter to 4 and click **OK**.
8. Click on the Parameter column of the second row. The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4.
9. Repeat steps 8 and 9 for third, fourth, and fifth rows.
10. After verifying all the parameters, click **Submit**.

The Request set will run and execute all the above concurrent programs sequentially.

**Table 11–8 Request Set: BIM Refresh of Materialized Views for Lead Intelligence**

| Seq | Concurrent Program                              | Parameters                       | Est Time | Comments  |
|-----|---|----------------------------------|----------|---|
| 1   | BIM: Refresh of Summary by Group Hierarchy      | Number of Parallel Processors: 4 | 10 Mins  | Prepares summarized tables based on group hierarchy. This has to be run first before running any other lead intelligence refresh materialized view program. |
| 2   | BIM: Refresh of Lead KPI Materialized Views     | Number of Parallel Processors: 4 | 45 Mins  | Builds Lead KPI Materialized Views  |
| 3   | BIM: Refresh of Lead Quality Materialized Views | Number of Parallel Processors: 4 | 60 Mins  | Builds Lead Quality Materialized Views  |
| 4   | BIM: Refresh of Lead Sources Materialized Views | Number of Parallel Processors: 4 | 60 Mins  | Builds Lead Sources Materialized Views  |
| 5   | BIM: Refresh of Lead Import Materialized Views  | Number of Parallel Processors: 4 | 5 Mins   | Builds Lead Import Materialized Views   |
| 6   | BIM: Refresh of Responses Materialized Views    | Number of Parallel Processors: 4 | 5 Min    | Builds Responses Materialized Views   |

### 11.3.3 Loading Marketing Facts from Previous Refresh Date

This request set will load all the marketing facts from the previous refresh date. Execute this Request Set on a daily basis. This program has to be run each time facts are loaded or refreshed.

## Prerequisites

None

## Steps

1. Log in to Oracle Forms as Marketing Intelligence Collection Manager.
2. Navigate to Requests > Run.
3. Select the Request Set Radio button and click **OK**.
4. Select BIM: Load Marketing facts from previous refresh date from the LOV. The Program block will display the concurrent programs listed below.
5. Click on the Parameter column of the first row.
6. The system displays a Parameter window, where all the parameters are defaulted automatically.
7. Note that the End date is defaulted to the sysdate. Change the date as desired and click OK.
8. Click on the Parameter column of the second row.
9. The system displays a Parameter window with all the parameters defaulted automatically. Note that the end date is defaulted to the value entered in the first row. Change the date as desired and click **OK**.
10. Click on the Parameter column of the third row.
11. The system displays a Parameter window with all the parameters defaulted automatically.

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**Note:** The end date is defaulted from the value entered in the first row. Change the date as desired and click OK.

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12. After verifying all the parameters, click **Submit**. The Request Set will run and execute all the above concurrent programs sequentially.
13. Note: that this program has to be run on a daily basis.
14. Run the Request Set: BIM: Refresh Materialized Views, above, to build the materialized views following the steps instructions listed above.

**Table 11–9 Request Set: BIM Load Marketing Facts from Previous Refresh Date**

| Seq | Concurrent Program   | Parameters  | Est Time | Comments                 |
|-----|--|---|----------|--------------------------|
| 1   | BIM: Load Marketing Facts from previous refresh date                 | Object to Load: Campaign<br>End Date: (SYSDATE)   | 5 Mins   | Loads all Campaign Facts |
| 2   | BIM: Load Marketing Facts from previous refresh date                 | Object to Load: Event<br>End Date: (SYSDATE)      | 5 Mins   | Loads all Events Facts   |
| 3   | BIM: Load Marketing Facts from previous refresh date                 | Object to Load: Budget<br>End Date: (SYSDATE)     | 5 Mins   | Loads all Budget Facts   |
| 4   | BIM: Load Key Performance Indicator facts from previous refresh date |   | 5 Mins   | Loads all KPI Facts      |
| 5   | BIM: Load Marketing Facts from previous refresh date                 | Object to Load: Leads<br>End Date (SYSDATE)       | 5 Mins   | Loads Lead Facts         |
| 6   | BIM: Load Marketing Facts from previous refresh date                 | Object to Load: Lead_Import<br>End Date (SYSDATE) | 5 Mins   | Loads Lead Import Facts  |
| 7   | BIM: Load Marketing Facts from previous refresh date                 | Object to Load: Response<br>End Date (SYSDATE)    | 5 Mins   | Loads Web Response Facts |



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## Oracle Marketing Profile Option Reference

This appendix describes Oracle Marketing related profile options and settings.

Topics include:

- [Section A.1, "Before You Begin"](#)
- [Section A.2, "Setting Profile Options"](#)
- [Section A.3, "Oracle Marketing Profile Option Reference"](#)

## A.1 Before You Begin

Before making Oracle Forms settings, ensure that all Oracle Applications server processes are up and running. In particular, if you stopped concurrent managers before applying Oracle Applications patchsets, restart them now by changing to `$COMMON_TOP/admin/scripts`, and executing `adcmctl.sh <APPS username / APPS password> start`.

## A.2 Setting Profile Options

Most profile options ship with a seeded value. Setting or changing profile option values is one way to change the default behavior of the application. You may or may not want to change profile option values depending on business requirements.

Profile options can be set at four levels:

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

Use the following procedure to set any profile option.

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**Note:** When setting profile options it may be necessary to log out and back in (and stop/restart the Web server) for changes to take effect.

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### Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Navigate to Profile > System.
3. Check the level(s) at which you want to set the profile option. The available levels are listed below:
  - Site

- Application—If you select this level, choose the application from the Application LOV for which you want to set the profile option.
  - Responsibility—If you select this level, choose the responsibility from the Responsibility LOV for which you want to set the profile option.
  - User—If you select this level, choose the user from the User LOV for whom you want to set the profile option.
4. In the Profile field, enter the profile name, such as `AMS: Default Percent Formula`, or a wildcard search criterion such as `AMS%`.
  5. Click Find.

The System Profile Values form opens with the results of your search.
  6. Verify or set the profile option(s) at the levels that you selected.
  7. Field and Variable Values window, choose **APPLICATION\_ID** from the Field LOV.

The Value field in the Examine Field and Variable Values window is populated with the value of `APPLICATION_ID`.
  8. In the Examine Field and Variable Values window, choose **RESPONSIBILITY\_ID** from the Field LOV.

The Value field in the Examine Field and Variable Values window is populated with the value of `RESPONSIBILITY_ID`.

## A.3 Oracle Marketing Profile Option Reference

The following table displays profile options used by Oracle Marketing.

**Table A–1 Oracle Marketing Profile Options**

| <b>Option</b>  | <b>Required/<br/>Optional</b> | <b>Level</b>                 | <b>Setting</b>                                       | <b>Effect/Limitation</b>   |
|--|-------------------------------|------------------------------|--|--|
| AMS : Admin Group  | Required                      | Site                         | Select from any group defined in JTF Resource Groups | Resources that are part of this group will have full access to all campaigns, Events, and other marketing objects. Note that this should be a single level group.  |
| AMS : Allow committed budget to exceed total budget                                  | Required                      | Site<br>Appl<br>Resp<br>User | Yes/No   | If set to <b>Yes</b> , the committed amount for a budget can exceed its total budget amount.<br><br>If set to <b>No</b> , the committed amount may not exceed the total budget amount. Set to no if you intend to use budget not just for sourcing but also for imposing financial control over budgetary usage.   |
| AMS : Allow Recalculation of Committed Budget  | Optional                      | Site                         | Yes/No   | Re-Calculated Committed is an option to re-calculate the necessary funding level based on the actual sales performance of a promotion (i.e. offer). Funds can be increased or decreased. If the promotion performs well, funding can be automatically increased, and vice versa.<br><br>If set to <b>Yes</b> the concurrent process( for recalculate commit) will perform re-calculation of offers' committed amounts.<br><br>If set to <b>No</b> re-calculation will not be performed. Users are still able to see the Re-Calculated Committed budget column, it will simply be equal the Committed column. |
| AMS : Allow updates to Price Lists created in Advanced Pricing from Oracle Marketing | Required                      | Resp                         | Yes/No   | Selecting Yes will allow Price lists created using Advanced Pricing can be edited in Oracle Marketing.   |
| AMS : Allow Un-Related ShipTo On Claims  | Optional                      | Site                         | Yes/No   | This profile determines whether the ship to site can be un-related to the bill to site. In both Order Management and in AR this is possible. For example, the bill-to and ship-to may have absolutely no relationship set up. Since TM integrates closely with these two, a similar profile is provided.   |



**Table A-1 Oracle Marketing Profile Options(Cont.)**

| <b>Option</b>                                    | <b>Required/<br/>Optional</b> | <b>Level</b>                 | <b>Setting</b>   | <b>Effect/Limitation</b>  |
|--|-------------------------------|------------------------------|--|---|
| AMS : Auto Register for Events upon cancellation | Required                      | Site                         | Yes/No   | This is used to determine if the attendee can be moved from the waiting list to registered status if a spot is available  |
| AMS : AR Credit Method For Rule                  | Required                      | Site<br>Resp                 | Credit method values from AR                               | Determines who revenue and transaction line balances will impact when TM creates an invoice credit to settle a deduction. The selections are passed to AR.  |
| AMS : AR Credit Method For Installment           | Required                      | Site<br>Resp                 | Credit method values from AR                               | Determines who revenue and transaction line balances will impact when TM creates an invoice credit to settle a deduction. The selections are passed to AR.  |
| AMS: Budget has Grace Period                     | Optional                      | Site<br>Appl<br>Resp<br>User | Yes/No   | <b>Yes</b> indicates that budgets can have grace periods.   |
| AMS : Budget Adjustment Grace Period in Days     | Optional                      | Site<br>Appl<br>Resp<br>User | Enter any integer (for number of days)                     | <p>Budget reconciliation may be performed manually or automatically.</p> <ul style="list-style-type: none"> <li>■ <b>If automatic:</b> The "AMS-TM: Release Committed Budget Amount After Grace Period concurrent program is used to reconcile budgets. This program waits before reconciling the sourced budgets of an object after the closing date of the object.</li> <li>■ <b>If manual:</b> The offer is evaluated on a case by case basis. Use automatic if you would like to systematically reconcile the budgets.</li> </ul> |
| AMS : Choose Date Qualifier Regions              | Required                      | Site                         | Show All<br>Show Header Dates<br>Show only Date Qualifiers | <p>This profile is used in the Trade Deal Offer User Interface.</p> <p>Based on the setting, the user may either enter date qualifiers or Header Dates or both.</p>   |

**Table A–1 Oracle Marketing Profile Options(Cont.)**

| <b>Option</b>                                | <b>Required/<br/>Optional</b> | <b>Level</b>                 | <b>Setting</b>                    | <b>Effect/Limitation</b>   |
|--|-------------------------------|------------------------------|-----------------------------------|--|
| AMS : Claim Write Off Threshold              | Optional                      | Site<br>Appl<br>Resp<br>User |                                   | This write-off threshold is defined as the difference between the total and the settlement value returned from AR. For an invoice related deduction, if the difference amount (Claim amount less the AR credit memo amount) is less than this write-off threshold amount, Trade Management will automatically create a write-off claim line and create a negative adjustment to the invoice.                             |
| AMS : Confirmation URL                       | Required                      | Site                         | URL                               | Contact preferences can be updated by the user using self service pages which are invoked by updating the contact preferences link in an e-mail text body.<br><br>Once the user updates the contact preferences he or she is redirected to the page specified in this profile.   |
| AMS : Copy Event Details to Event Schedules  | Required                      | Site                         | Yes/No                            | This is used to allow details of parent Event to be copied to the schedule   |
| AMS: Cut Off Percentage for Approval         | Optional                      | Site                         | Enter any number (for percentage) | This determines what percentage of the estimated budget amount an object must secure in actual funding before the object can go active.<br><br>For example, if you enter 100, it means 100%. An offer's estimated budget amount is \$10K, meaning that it is estimated that this offer must get budget approved for \$10K before the offer can go active.<br><br>This applies only to a Trade Management implementation. |
| AMS : Implement Contra Charge Payment Method | Required                      | Site                         | Yes/No                            | If set to Yes, "Contra Charge" is a settlement option available when settling claims. Contra charges are used to track offsetting balances for creditors who are also debtors.   |

**Table A–1 Oracle Marketing Profile Options(Cont.)**

| <b>Option</b>                          | <b>Required/<br/>Optional</b> | <b>Level</b> | <b>Setting</b>   | <b>Effect/Limitation</b>   |
|--|-------------------------------|--------------|--|--|
| AMS : Currency Conversion Type         | Required                      | Site         | Select from conversions defined in GL, such as Corporate or Spot.                              | This is the exchange rate used for converting transactional amounts into the default currency.   |
| AMS : Custom Condition Class           | Optional                      | Site         | Java class name of the custom condition  | This class is invoked in the runtime when custom conditions are implemented.   |
| AMS : Cut off percentage for Approvals | Required                      | Site         | Enter a value between 0 and 100  | For a marketing object with an Initial Estimated Amount (IEA) value entered into the Budget page for that object to go to Active status, it must obtain budget approval for this percentage of the IEA. During the initial stage, before the object status is Active, requests in excess of the IEA are not allowed. |
| AMS : Data Mining Across Database Link | Optional                      | Site         | Yes or No  | Profile to determine if data mining uses a DB Link.<br><br>Determines if the installation is a single or dual installation<br><br>No (or no value) for this profile means single installation scenario.<br><br>Yes means a dual installation scenario.   |
| AMS : Data Mining Engine Output Schema | Required                      | Site         | Free form text corresponding to the scoring output schema.                                     | The scoring run result processing program will use the scheme specified to fetch the results.  |
| AMS : Data Mining Debug Enabled        | Optional                      | User         | Default value is No. When set to Yes, debug is turned on, when set to No, debug is turned off. | Enables debugging information to be written in the concurrent request log.   |

**Table A–1 Oracle Marketing Profile Options(Cont.)**

| <b>Option</b>                           | <b>Required/<br/>Optional</b>    | <b>Level</b>                 | <b>Setting</b>  | <b>Effect/Limitation</b>  |
|---|----------------------------------|------------------------------|---|---|
| AMS : Data Mining Server JDBC URL       | Required for a dual installation | Site                         | This site level profile option is required if the customer is implementing a dual installation system, where Apps is in one instance and ODM is in another. | The JDBC connect string for the ODM server.<br><br>Only required for a dual installation data mining scenario.  |
| AMS : Default Amount Formula            | Required                         | Site                         | Supported Formulas  | Used to set the default formula for discount rule. For example, if the value is set to “handling”, then when changing the discount type to “amount”, the value of the formula is set to “handling”.   |
| AMS : Default Bucket for discount rules | Required                         | Site                         | Values from Advanced Pricing Lookup PRICING_GROUP_SEQUENCE  | The value set here will be used as the default value for buckets in the discount rules.   |
| AMS : Default Budget for a Person       | Required                         | Site<br>Appl<br>Resp<br>User | Choose a budget name from the list of available budgets   | During budget request for all objects, users may decide to source from a Budget or from a Person. When sourcing is made to a person, the system will automatically default the budget name specified on this profile on to the budget request. Users will be able to change it on screen. |
| AMS : Default Currency Code             | Required                         | Site                         | Select from currencies defined in FND_CURRENCIES  | This becomes the default functional currency. All transactions will be converted and stored in this currency. This will be the default currency for Currency LOV.   |

**Table A-1 Oracle Marketing Profile Options(Cont.)**

| Option  | Required/<br>Optional | Level                        | Setting   | Effect/Limitation  |
|---|-----------------------|------------------------------|---|--|
| AMS : Default Cust View   | Optional              | Site<br>Appl<br>Resp<br>User | Yes/No  | Default value is <b>No</b> .<br><br>If set to <b>Yes</b> , a user can see the Budget Customer View from the Budget summary page.   |
| AMS : Default Offer Formula                                     | Optional              | Site                         | Available pricing formulas in Advanced Pricing                          | This option handles discount rules for product categories when the Unit of Measure is not specified.   |
| AMS : Default Partner Budget                                    | Optional              | Site<br>Appl<br>Resp<br>User | Choose a budget name from the list of available budgets                 | Default budget for a partner   |
| AMS : Default Period in Days for recalculating committed budget | Optional              | Site<br>Appl<br>Resp<br>User | Enter any integer (for number of days)                                  | This profile determines how often updates to Re-Calculated Committed are performed. Enter any number greater than or equal to one.<br><br>For example: <ul style="list-style-type: none"> <li>■ If set to 1, Re-Calculated Committed change after 1 day.</li> <li>■ If set to 2, Re-Calculated Committed change after 2 days.</li> </ul> |
| AMS : Default Percent Formula                                   | Required              | Site                         | Formulas Supported in Advanced Pricing                                  | Used to set the default formula for a Discount Rule having Discount Type "Percent". For example, if the Value is set to "Handling" then when changing the Discount Type to "Percent" the value of Formula is set to "Handling".  |
| AMS : Default Phase for Line level discounts                    | Required              | Site                         | Available values are derived from Event phase setup in Advanced Pricing | This value will be used as the default value for phase for all discount rules with a discount level of Line.   |

**Table A-1 Oracle Marketing Profile Options(Cont.)**

| <b>Option</b>   | <b>Required/<br/>Optional</b> | <b>Level</b>                 | <b>Setting</b>  | <b>Effect/Limitation</b>  |
|---|-------------------------------|------------------------------|---|---|
| AMS : Default Phase for Line Group level discounts    | Required                      | Site                         | Available values are derived from Event phase setup in Advanced Pricing                                     | This value will be used as the default value for phase for all discount rules with a discount level of Group of Lines.  |
| AMS : Default Phase for Order level discounts         | Required                      | Site                         | Available values are derived from Event phase setup in Advanced Pricing                                     | This value will be used as the default value for phase for all discount rules with a discount level of Order.   |
| AMS : Default Product Stylesheet                      | Required                      | Site                         | User defined  | Determines the default stylesheet file for Products.  |
| AMS : Default Schedule Stylesheet                     | Required                      | Site                         | User Defined  | Determines the default stylesheet file for Schedules.   |
| AMS : Default Task Status for creating Task Templates | Optional                      | Site                         | Depends on JTF Task Statuses  | If nothing is entered here, tasks will default to 'unassigned'.   |
| AMS : Default value for Print on Invoice Flag         | Required                      | Site                         | Yes/No  | Used as a default for all discount rules.   |
| AMS : Default value for Product precedence            | Required                      | Site                         | User Defined  | Used as a default for all discount rules.   |
| AMS : Default value for incompatibility group         | Optional                      | Site<br>Appl<br>Resp<br>User | Choose an incompatibility group from a list of available incompatibility groups set up in Advanced Pricing. | <p>This profile only applies to fully accrued budget.</p> <p>Incompatibility Group is setup Advanced Pricing, it determines how promotions will be grouped together and which ones will be applied together with other promotions.</p> <p>Being that a fully accrued budget creates an offer in the background, and being that the offer will by default have this incompatibility group, this concerns a fully accrued budget.</p> <p>Users can change this defaulted value while setting up the fully accrued budget.</p> |

**Table A-1 Oracle Marketing Profile Options(Cont.)**

| <b>Option</b>                                | <b>Required/<br/>Optional</b> | <b>Level</b>                 | <b>Setting</b>        | <b>Effect/Limitation</b>   |
|--|-------------------------------|------------------------------|-----------------------|--|
| AMS : Email Footer Banner                    | Optional                      | User                         | Image File and Path   | Image for the email footer of an email blast.  |
| AMS : Email Header Banner                    | Optional                      | User                         | Image File and Path   | Image for the email header of an email blast.  |
| AMS Enable Fulfillment                       | Optional                      | Site                         | Yes/No                | Enables Oracle One-to-One Fulfillment Service Integration.   |
| AMS : Enable Tip Text                        | Optional                      | User                         | Yes/No                | Tip text will be displayed in the UI.  |
| AMS : HZ Dedupe Rule                         | Optional                      | Site                         | Yes/No                | Indicates whether deduplication rules are in effect for records placed into TCA.   |
| AMS : Implement Contra Charge payment method | Required                      | Site                         | Yes/No                | If set to Yes, "Contra Charge" is a settlement option available when settling claims. Contra charges are used to track offsetting balances for creditors who are also debtors. |
| AMS : Implement Client File Size             | Required                      | Site                         | Numeric value         | Default value is 1000000. For Oracle Marketing List Import functionality, this value sets the file size limit in terms of bytes that can be uploaded by client.                |
| AMS : Implement Payables                     | Required                      | Site                         | Yes/No                | If get to Yes, "Check" is a settlement option available when settling claims.  |
| AMS : Implement Payables Integrations        | Optional                      | Site<br>Appl<br>Resp<br>User | Yes/No                | This profile value will determine the availability of the "check" settlement method in Trade Management. A setting of Yes means that settlement by Check is available.         |
| AMS : Import Control File Path               | Required                      | Site                         | Control File Location | Path for the bin directory (\$AMS_TOP/bin)<br><br>Improper setup will cause the server side import to fail.  |
| AMS : Import Date File Path                  | Required                      | Site                         | Data File Location    | Path for the data file location<br><br>Improper setup will cause the server side import to fail.   |

**Table A–1 Oracle Marketing Profile Options(Cont.)**

| Option                                    | Required/<br>Optional | Level | Setting                               | Effect/Limitation  |
|---|-----------------------|-------|---------------------------------------|--|
| AMS : Interaction Logging Enabled         | Optional              | Site  |                                       | <p>To enable click-through destination logging in Interaction History, each time a customer/prospect clicks the URL, set AMS : Interaction Logging Enabled at site level.</p> <p>If set to Yes, each click-through is logged in Interaction History, in the JTF Interaction History Tables.</p> <p>If set to No, each click-through is not logged. This logging trail tracks the following information from the click through:</p> <ul style="list-style-type: none"> <li>■ Party-id</li> <li>■ Campaign Schedule source code</li> <li>■ Time and Date of the click-through</li> </ul> |
| AMS : Item Validation Master Organization | Required              | Site  | A Valid Master Inventory Organization | When a deliverable is flagged as an inventory item, it is created in Inventory under the specified master organization.  |
| AMS : Inventory Item Update Allows        | Optional              | Site  | Yes/No                                | Default value is no. a Marketer is able to update products created within the Oracle Marketing application. However, if a Marketer wants to be able update products from Oracle <u>Inventory</u> , set this value to Yes at Site level.  |
| AMS : List Workbook B2B Marketing         | Optional              | Site  | User Defined                          | Workbook name convention prefix for B2B workbooks. The default is B2B. No convention prefix will result in more workbooks than you need in the LOV.  |
| AMS : List Workbook B2C Prefix            | Optional              | Site  | User Defined                          | Workbook name convention prefix for B2C workbooks. The default is B2C. No convention prefix will result in more workbooks than you need in the LOV.  |



**Table A–1 Oracle Marketing Profile Options(Cont.)**

| Option                               | Required/<br>Optional | Level | Setting   | Effect/Limitation   |
|--------------------------------------|-----------------------|-------|---|---|
| AMS : Marketing Calendar             | Required              | Site  | Accounting Setting  | Seeded value for this profile is Null. he Calendar needs to be created and associated to this profile. For Oracle Marketing objects, the time periods come from the marketing calendar. The Marketing Calendar setups are performed prior to implementing Oracle Marketing.   |
| AMS : Marketing to ODM Database Link | Required              | Site  | All database links in the database.                                     | This profile is only necessary if implementing ODM in a dual instance environment.<br><br>The value of this profile options should be the name of the database link from the Oracle Marketing database instance to the ODM database instance. It allows Oracle Marketing to read scoring run results from the ODM results tables. |
| AMS: Merchant Party ID               | Optional              | Site  | Choose from a list of Parties provided                                  | This value determines the party ID of the current active merchant.<br><br>This sets the merchant ID for the creation of affiliate placements.<br><br>This option must be set before creating an affiliate site.   |
| AMS : OA_Media Path                  | Optional              | Site  | Physical file path of media directory where the image files are stored. | This is used in the upgrade process to read the files from the media directory and store them in the database.  |
| AMS : ODM to Marketing Database Link | Optional              | Site  | Name of database link   | Profile to determine the DB Link from ODM to APPS database. It is only required for a dual installation data mining scenario.   |
| AMS : Offer Confidential Flag        | Optional              | Site  | Yes/No  | Used to set default value for Confidential flag in Offer Creation form. For example, if setting to Yes, then every time an offer is created, it will default to confidential (which can be overridden).   |

**Table A-1 Oracle Marketing Profile Options(Cont.)**

| <b>Option</b>  | <b>Required/<br/>Optional</b> | <b>Level</b>                 | <b>Setting</b>                                    | <b>Effect/Limitation</b>   |
|--|-------------------------------|------------------------------|---|--|
| AMS : Offer Discount Level                               | Required                      | Site                         |   | Used to set default value for Offer discount level. For example if setting to Line, and minimum volume is 5, then each order line will have a minimum quantity of five to get a discount.  |
| AMS : Posting Runtime Shopping Cart Currency             | Required                      | Site                         | Select from a list of values. USD is the default. | Determines the currency in which shopping cart amounts are measured.   |
| AMS : Queue : Marketing Lists - Manual Assignments       | Optional                      | All                          | Yes/No  | This profile determines if a user can work on Marketing Lists - Manual Assignments. This profile assigns the user a universal work queue. In UWQ you can enable or disable a note that is exposed by telesales.  |
| AMS : Queue Order : Marketing Lists - Manual Assignments | Optional                      | All                          | Yes/No  | This profile is only applicable when Oracle Marketing is integrated with Oracle Telesales. Determines the order of appearance for the Universal Work Queue. This is only applicable if the profile AMS : Queue : Marketing Lists - Manual Assignment is enabled.                             |
| AMS : Prefix to Registration Confirmation Code           | Optional                      | Site                         | User Defined                                      | Characters for the Event Registration Confirmation Code.   |
| AMS : Pricelist Header Name for Events                   | Required                      | Site                         | User defined entry                                | Enter the name of the default price list for Events.   |
| AMS : Price Different Budget                             | Optional                      | Site<br>Appl<br>Resp<br>User | Choose a budget from a list of available budgets  | This is used for accruals created by the AMS-TM: Charge back Accruals concurrent process (which do not have any budgets assigned).<br><br>The program imports sell-through sales data into TM, often for the purpose of forecasting or creating promotional accruals for indirect customers. |
| AMS : Profile Search Set Size                            | Required                      | User                         | Numeric   | Indicates the number of rows displayed in selection windows.   |

**Table A-1 Oracle Marketing Profile Options(Cont.)**

| Option  | Required/<br>Optional | Level | Setting   | Effect/Limitation  |
|---|-----------------------|-------|---|--|
| AMS : Relationship Type for Buying Group        | Required              | Site  | Any valid relationship type created in TCA                    | Used to establish a hierarchical group of customers in TCA. For example, if value is set to subsidiaries then all parties who share this relationship will be part of a buying group. These are used as qualification criteria for offers.   |
| AMS : Root Section for Price List Report        | Required              | Site  | Sections defined in the hierarchy Tab of iStore's Merchant UI | Price list report available from the overview page will utilize the section set in this profile to determine the section hierarchy. Items can be grouped into sections. Sections in turn can be grouped into other sections, creating a hierarchical structure.                    |
| AMS: Server URL                                 | Optional              | Site  | User Defined  | <p>This value determines the runtime URL path of the server. Used to generate API details for affiliates during placement definition.</p> <p>This must be set before creating any affiliate placement definition.</p> <p>For example: <code>http://YourHostName:PortNum</code></p> |
| AMS : Scan Data UOM                             | Required              | Site  | All possible UOM values                                       | Used to set the default value for UOM in the Discount rules for Scan Data Offers. For example if you choose "Each" then each empty Discount Rule in Scan Data Offers will appear with UOM as "Each".   |
| AMS : Should Call to Inventory Modules be Made? | Required              | Site  | Yes/No  | Indicates whether a deliverable or an Event may be created as an Oracle Inventory item.  |
| AMS : Should call to Pricing Modules be Made?   | Required              | Site  | Yes/No  | Indicates whether a deliverable or an Event may be priced.   |
| AMS : Show GL Accounts On Screen                | Required              | User  | Yes/No  | Default is Yes. If Yes is selected the Sales/Expense Account field and the Accrual Liability Account field appear in the Create Budget page.   |

**Table A–1 Oracle Marketing Profile Options(Cont.)**

| <b>Option</b>                     | <b>Required/<br/>Optional</b> | <b>Level</b> | <b>Setting</b>  | <b>Effect/Limitation</b>  |
|-----------------------------------|-------------------------------|--------------|---|---|
| AMS : Source Code Date Format     | Required                      | Site         | Less than 6 characters  | Used in the generation of source codes. The value has to be less than 6 characters (ex. "MMDDYY").<br><br>Apache Server needs to be bounced after setting the profile options.  |
| AMS : Source Code sequence length | Required                      | Site         | Value must be between 1 and 10                                | Source Code includes Geography code, Month code, Activity code, Source code digits and Suffix. 2.<br><br>The value can be anything between 1 to 10 (4 or 5 is recommended).<br><br>Apache Server needs to be bounced after setting the profile options.   |
| AMS : Source From Parent Object   | Required                      | Site         | Yes/No  | Determines whether campaign schedules and Event Schedules are sourced from their parent campaigns and Events (Yes) or from budgets (No). Campaigns and Events, themselves, may only be sourced from budgets.  |
| AMS : Store Date in Qualifiers    | Required                      | Site         | Yes/No  | Used to specify the location to store date qualifiers in the offers. If this is set to Yes, the date qualifier (for example, shipping date) is stored in the qualifier. If the value is set to No, the date qualifier is stored in the header.  |
| AMS : Universal Currency          | Required                      | Site         | Choose any valid currency from a list of available currencies | This profile determines the currency for the rollup view. It allows the rollup view of a budget to display correctly by converting all entries to a single currency.<br><br>Different users will, however, be able to see the Rollup View in different currencies based on the user level profile option JTF_PROFILE_DEFAULT_CURRENCY. (In other words, the universal currency profile is simply for storage in the background).<br><br>Once set the profile should not be changed. |
| AMS : Update Claim Access         | Optional                      | Site User    | Yes/No  | This profile controls whether non-claim owners AND non-claim team members get update or view access to the claims.  |

**Table A-1 Oracle Marketing Profile Options(Cont.)**

| Option  | Required/<br>Optional | Level | Setting                     | Effect/Limitation   |
|---|-----------------------|-------|-----------------------------|---|
| AMS : UOM Area  | Required              | Site  | Depends on UOM Setup        | If not set correctly, will not be displayed for fields that use UOM (for example, area in square feet).   |
| AMS : UOM Length  | Required              | Site  | Depends on UOM Setup        | If not set correctly, will not be displayed for fields that use UOM (for example, length in feet).  |
| AMS : UOM Quantity  | Required              | Site  | Depends on UOM Setup        | If not set correctly, will not be displayed for fields that use UOM (for example, units in each).   |
| AMS : UOM Time  | Required              | Site  | Depends on UOM Setup        | If not set correctly, will not be displayed for fields that use UOM (for example, time in minutes).   |
| AMS : Upgrade Complete Flag   | Optional              | Site  | Yes/No                      | Yes means no upgrade and No means will upgrade data.  |
| AMS : Upgrade iMarketing  | Optional              | Site  | Yes/No                      | Used to determine whether to upgrade iMarketing data from the previous version.   |
| AMS : User Country  | Required              | User  | Select from valid countries | Defaults new objects to this country when created.  |
| AMS : Validate Market and Product Eligibility Between Object and Budget | Required              | Site  | Yes/No                      | Default value is <b>No</b> .<br><br>If set to <b>Yes</b> , the product and marketing eligibility of an offer must fall within the targets of the budget. The eligibilities of a budget must include those of an offer. Even if different parameters are used for defining these eligibilities (e.g. budget uses Territories, but offer uses Customer), the validation procedure can still decide whether the offer falls within budget (e.g. budget says "US West" territory, offer says "Business World", the procedure will figure out, based on the definition of the US West territory, whether it includes the customer Business World in it). |

**Table A-1 Oracle Marketing Profile Options(Cont.)**

| <b>Option</b>                   | <b>Required/<br/>Optional</b> | <b>Level</b> | <b>Setting</b>                        | <b>Effect/Limitation</b>  |
|---------------------------------|-------------------------------|--------------|---------------------------------------|---|
| AMS : Validation Level          | Optional                      | User         | 0-100                                 | This profile option affects the validation severity at the database level. A value of 100 (Maximum value of 100) would cause the APIs to validate the passed data very stringently. |
| HZ: Address Key Length          | Optional                      | Site         | Length of the Address                 | This determines the length of Address key.  |
| BIM Month Period Type           | Required                      | Syst         |                                       | Select the month period type defined on the Marketing Calendar.   |
| BIM Quarter Period Type         | Required                      | Syst         |                                       | Select the quarter period type defined on the Marketing Calendar.   |
| BIM Year Period Type            | Required                      | Syst         |                                       | Select the year period type defined on the Marketing Calendar.  |
| Client Timezone                 | Required                      | User         | Select from a List of Timezone Values | This profile is used by the Marketing APIs for converting user entered date and time to server specific date and time.<br>This profiles replaces AMS : CLIENT_TIME_ZONE_ID.         |
| HZ: Key Word Count              | Optional                      | Site         | Number of words                       | This number determines how many words in the customer name are used to generate the keys.   |
| HZ: Postal Code Key Length      | Optional                      | Site         | Length of the Postal Code             | This determines the length of Postal Code key.  |
| IBE: Use Web Placements         | Required                      | App          | Yes/No                                | Determines whether placements are displayed. Required only when implementing iStore.  |
| ICX: Discoverer End User Layer  | Required                      | Site         | User Defined                          | EUL prefix for Discoverer, Usually EUL4   |
| ICX: Discoverer Launcher        | Required                      | Site         | User Defined                          | URL to launch Discoverer Web version  |
| ICX: Discoverer Use Viewer      | Optional                      | Site         | Yes/No                                | Whether to use viewer instead Web Discoverer. Defaulted to No.  |
| ICX: Discoverer Viewer Launcher | Required                      | Site         | User Defined                          | URL to launch Discoverer viewer   |

**Table A-1 Oracle Marketing Profile Options(Cont.)**

| Option                            | Required/<br>Optional | Level        | Setting  | Effect/Limitation   |
|-----------------------------------|-----------------------|--------------|--|---|
| JTF Home Page File Name           | Optional              | Site or App  | User Defined.  | Enter a file name of the jsp file (for example, jtfhomepage.jsp). If no value is supplied, a generic information page is displayed. If a file is supplied it will be displayed on the homepage.   |
| JTF_FM_BASE_IMAGE_URL             | Optional              | Site         | Host and port name of application installation instance    | If adding images to templates this profile must be set at site level. When uploading images to be stored in the database, the application must be enabled to retrieve files from the database. This profile enables this retrieval. The value of this profile must be set to the same value as your application installation. For example:<br><br>http://<host_name>:<port_number>/OA_HTML/ |
| JTF_FM_UNSUBSCRIBE_TEXT           | Optional              | Site         | Replace host and port with your host name and port number. | Use this profile to enable users to unsubscribe from email blasts.<br><br>@ Click <a href="http://host:port/OA_HTML/amsContactPreferencesMain.jsp?PAGE.<br><br>OBJ.requestId=&PAGE.OBJ.objId="here</a>to unsubscribe.   |
| OSO: Minimum search string length | Optional              | Site or User | User Defined   | The default setting is 0. This profile determines the number of characters that must be entered before performing a search.   |
| OSO: Search Lead Wildcard         | Optional              | Any          | Yes/No   | If Yes, the wildcard (%) will be allowed as the first character in a search string. If No, and the wildcard is entered as the first character, the system will give the user an error message.  |
| OSO : Customer Access Privilege   | Required              | Resp         | Full   | Set this profile to Full in order to grant access the Venue subtab.   |
| QP: Accrual UOM Class             | Required              | Site         | UOM Classes as set up in Inventory                         | Used by accrual offers. All accrual units will fall under this UOM class. For example, frequent flyer miles.  |

**Table A–1 Oracle Marketing Profile Options(Cont.)**

| <b>Option</b>                         | <b>Required/<br/>Optional</b> | <b>Level</b> | <b>Setting</b>   | <b>Effect/Limitation</b>  |
|---------------------------------------|-------------------------------|--------------|--|---|
| QP: Item Validation Organization      | Required                      | Resp         | Select from Inventory Organizations as set up in Inventory | Offers can be defined only for those products which will be available in the specified organization. Required for all offers.<br><br>Prices may be defined only for those products which will be available in the specified organization. |
| Server Timezone                       | Required                      | Site         | Select from a List of Timezone Values                      | This profile is used by the Marketing APIs for converting user entered date and time to server specific date and time.<br><br>Note: AMS : SERVER_TIMEZONE_ID is obsolete and Server Timezone should be used instead.                      |
| QP: Source System Code                | Required                      | Resp         | Possible Source Systems that can define offers             | Offers created using this relationship are tagged with this system source code and will be used to determine update privileges of offers within the pricing module.   |
| Task Manager: Default assignee status | Optional                      | App          | User Defined   | Specifies the default assignee status when creating or assigning a task.  |
| Task Manager: Default Priority        | Optional                      | App          | User Defined   | Specifies the default task priority when creating a task.   |
| Task Manager: Default Task Status     | Optional                      | App          | User Defined   | Required for implementing a task transition rule. This profile option must be set to the initial status of the rule.  |
| Task Manager: Owner type for a task   | Optional                      | App          | User Defined   | Specifies the default task type when creating a task.   |



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## Oracle Marketing Lookup Reference

This appendix describes concepts and procedures related to lookups that are used by Oracle Marketing.

Topics include:

- [Section B.1, "Understanding Lookups"](#)
- [Section B.2, "Creating New Lookup Types"](#)
- [Section B.3, "Oracle Marketing Lookup Reference"](#)

## B.1 Understanding Lookups

Lookups provide the list of values (LOVs) that appear in Oracle Marketing user interface drop-down lists. Lookup values make choosing information quick and easy, they ensure that users enter only valid data into Oracle Marketing.

Most Lookups are predefined (seeded in the application), the seeded value can be left as is, or they can be customized to fit your business needs. Lookups are stored in the FND\_LOOKUPS table which is part of the Application Object Library (AOL).

You can add new Lookups Values at any time. You can set the Enable Flag for a Value to No, so that it will no longer appear in the list of values, or you can use the Start and End Dates to control when a value will appear in a list.

When implementing Oracle Marketing you will be setting three types of Lookups:

- **System:** System Lookups may not be modified or deleted, and may not have additional values added.
- **Extensible:** Extensible Lookups may have additional values added to the list. Seeded extensible Lookups may not be deleted.
- **User:** User Lookups are completely modifiable. They may be modified and/or added to. Seeded user Lookups, if any, may be modified or deleted.

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**Note:** All levels of Lookups may have their visible values modified.

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## B.2 Creating New Lookup Types

To create a new lookup type, add values to an existing lookup type, or prevent existing values from appearing in a lookup type, use the Application Utilities Lookups window. You must log out and log in again to see the effect of your changes.

To define a new Lookup type and Lookup value use the following procedure:

### Prerequisites

None

### Steps

1. Log in to Oracle Forms with System Administrator Responsibility.
2. Navigate to Application > Lookups.

3. Choose the access level for the lookup type.
4. Enter the lookup type.
5. Enter the user name of the lookup. This is the name that users will see from within the application.
6. Select the application in which the lookup will be used.
7. Optionally, add a description of the lookup type.
8. If you want to add lookup values specific to the security group/business group linked to your current responsibility, un-check the Global Security Group check box. Existing lookup values are available to all business groups.
9. Enter the code, meaning and optionally a description for each value. Leave the Tag column blank.
10. If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.
11. Save your work.

## B.2.1 Adding Values to an Existing Lookup

To add a new value to an existing Lookup use the following procedure:

### Prerequisites

None

### Steps

1. Query the lookup type to which you want to add a value.  
You cannot add values if the access level is System.
2. If you want to add lookup values specific to the security group/business group linked to your current responsibility, un-check the Global Security Group check box. Existing lookup values are available to all business groups.
3. Enter the code, meaning and optionally a description for each value. Leave the Tag column blank.
4. If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.
5. Save your work.

## B.3 Oracle Marketing Lookup Reference

The following table lists the Lookup settings used by Oracle Marketing.

**Table B–1 Oracle Marketing Lookup Values**

| Key                      | Type       | Values  | Meanings   |
|--------------------------|------------|---|--|
| AGGREGATE_BY             | System     | YEAR<br>MONTH<br>QTR<br>INCREMENT   | Year<br>Month<br>Quarter<br>Increment  |
| AMS_ACCESS_TYPE          | System     | Group<br>User   | Group<br>User  |
| AMS_ACCRUAL_BASIS        | System     | Customer<br>Sales   | Customer<br>Sales  |
| AMS_ADJUSTMENT_TYPE      | Extensible | Decrease_<br>Committed<br>Decrease_<br>Comm_Earned<br>Decrease_Earned<br>Standard | Decrease Committed Amount<br>Decrease Committed and Earned Amounts<br>Decrease Earned Amount<br>Increase Earned Amount |
| AMS_BUDGET_SOURCE_STATUS | System     | Approved<br>Closed<br>New<br>Pending<br>Rejected                                  | Approved<br>Closed<br>Planning<br>Pending<br>Rejected  |
| AMS_BUDGET_TRANS_TYPE    | User       | Credit<br>Debit   | Credit<br>Debit  |
| AMS_CAMP_FULFILL_ON      | System     | On_Invite   | On Invite  |
| AMS_CAMP_RELATED_EVENT   | System     | EONE<br>EVEH<br>EVEO  | One-Off Event<br>Event<br>Event Schedule   |

**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| <b>Key</b>                   | <b>Type</b> | <b>Values</b>  | <b>Meanings</b>   |
|------------------------------|-------------|--|---|
| AMS_CAMPAIGN_PURPOSE         | Extensible  | Awareness<br>Lead<br>Lead_Maturation<br>Sales_Readiness  | Awareness<br>Lead Generation (?)<br>Lead Maturation<br>Sales Readiness  |
| AMS_CAMPAIGN_SCHEDULE_STATUS | System      | Active<br>Archived<br>Available<br>Cancelled<br>Closed<br>Completed<br>Denied_BA<br>New<br>On_Hold<br>Submitted_BA   | Active<br>Archived<br>Available<br>Cancelled<br>Closed<br>Completed<br>Denied Budget Approval<br>New<br>Active, but locked<br>Pending Budget Approval   |
| AMS_CAMPAIGN_STATUS          | System      | Active<br>Archived<br>Available<br>Cancelled<br>Closed<br>Completed<br>Denied_BA<br>Denied_TA<br>New<br>On_Hold<br>Planning<br>Submitted_Budget Approval<br>Submitted_Theme Approval | Active<br>Archived<br>Available<br>Cancelled<br>Closed<br>Completed<br>Denied Budget Approval<br>Denied Theme Approval<br>New<br>Active, but locked<br>Planned<br>Submitted for Budget Approval<br>Submitted for Theme Approval |
| AMS_CLAIM_CLASS              | System      | Claim<br>Deduction   | Claim<br>Deduction  |

**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| Key                      | Type       | Values  | Meanings  |
|--------------------------|------------|---|---|
| AMS_CLAIM_HISTORY_EVENT  | System     | Changes<br>Line<br>New<br>Split   | Changes<br>Line<br>New<br>Split   |
| AMS_CLAIM_PAYMENT_METHOD | System     | Check<br>Credit_Memo<br>Debit_Memo  | Check<br>Credit Memo<br>Debit Memo  |
| AMS_CLAIM_STATUS         | System     | Approved<br>Cancelled<br>Closed<br>Complete<br>Duplicate<br>New<br>Open<br>Pending<br>Pending_Approval<br>Pending_Close<br>Rejected | Approved<br>Cancelled<br>Closed<br>Complete<br>Duplicate<br>New<br>Open<br>Pending<br>Pending Approval<br>Pending Close<br>Rejected |
| AMS_CONTACT_POINT_TYPE   | Extensible | Address<br>Email<br>Fax<br>Inbound_script<br>Outbound_script<br>Phone<br>Website<br>Proposal  | Address<br>Email<br>Fax<br>Inbound Script<br>Outbound Script<br>Phone<br>Website<br>Proposal  |
| AMS_CONTENT_TYPE         | Extensible | HTML<br>Text  | HTML<br>Text<br>Used for email schedules  |

**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| Key                              | Type       | Values  | Meanings  |
|----------------------------------|------------|---|---|
| AMS_CREATION_SIGN                | System     | +<br>-  | Positive<br>Negative  |
| AMS_DEDUCTION_<br>PAYMENT_METHOD | System     | Adjustment<br>Chargeback<br>Contra_Charge<br>Credit_Memo<br>Debit_Memo<br>Reg_Credit_<br>Memo<br>Write_Off                                  | Adjustment<br>Chargeback<br>Contra Charge<br>On Account Credit<br>Debit Memo<br>Invoice Credit<br>Write Off   |
| AMS_DELIV_STATUS                 | User       | Archived<br>Available<br>Cancelled<br>Denied_BA<br>New<br>Submitted_BA<br>Superceded<br>Expired<br>Denied_TA<br>Budget_Appr<br>Submitted_TA | Archived<br>Available<br>Cancelled<br>Denied - Budget Approval<br>New<br>Submitted - Budget Approval<br>Superceded<br>Expired<br>Denied - Concept Approval<br>Budget Approved<br>Submitted - Concept Approval |
| AMS_DELIVERY_<br>MEDIA_TYPE      | Extensible | I SEMINAR<br>ON_SITE<br>SEMINAR<br>WEB  | I Seminar<br>On Site<br>Seminar<br>Web  |

**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| Key                      | Type   | Values   | Meanings   |
|--------------------------|--------|--|--|
| AMS_DM_MODEL_STATUS      | System | Available<br>Draft<br>Building<br>Scheduled<br>Scoring<br>Archived<br>Expired<br>Custom<br>Preview<br>Queued | Available<br>Draft<br>Building<br>Scheduled<br>Scoring<br>Archived<br>Expired<br>Custom<br>Preview<br>Queued |
| AMS_DM_MODEL_TYPE        | System | Email<br>Telemarketing<br>DirectMail<br>Loyalty<br>Custom  | Email Response<br>Telemarketing Response<br>Direct Mail Response<br>Loyalty<br>Custom                        |
| AMS_DM_SCORE_STATUS      | System | Draft<br>Scheduled<br>Scoring<br>Completed<br>Archived<br>Preview<br>Queued                                  | Draft<br>Scheduled<br>Scoring<br>Completed<br>Archived<br>Preview<br>Queued                                  |
| AMS_DM_SOURCE_TYPE       | System | Standard<br>Cell<br>CSCH<br>DIWB   | Generated List<br>Segment<br>Campaign Schedule<br>Discoverer Workbook  |
| AMS_DM_TARGET_GROUP_TYPE | System | Business<br>Consumer   | Organization Contacts<br>Persons   |



**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| Key                          | Type   | Values   | Meanings   |
|------------------------------|--------|--|--|
| AMS_DM_TARGET_VALUE_TYPE     | System | Binary<br>Categorical<br>Continuous  | Binary<br>Categorical<br>Continuous  |
| AMS_EVENT_AGENDA_STATUS      | System | Confirmed<br>Unconfirmed   | Confirmed<br>Unconfirmed   |
| AMS_EVENT_ATTENDANCE_FAILURE | System | Agenda_Change<br>Disaster<br>Personal_Emergency<br>Schedule_Conflict<br>Speaker_Change<br>Venue_Change<br>Work_Emergency | Agenda Change<br>Natural Disaster<br>Personal Emergency<br>Schedule Conflict<br>Speaker Change<br>Venue Change<br>Work Emergency |
| AMS_EVENT_CANCEL_REASON      | System | Disaster<br>Insufficient_Reg<br>Postponed<br>Schedule_Conflict<br>Speaker_Unavailable<br>Venue_Unavailable               | Natural Disaster<br>Insufficient Registration<br>Postponed<br>Schedule Conflict<br>Speaker not available<br>Venue not available  |
| AMS_EVENT_CERT_CREDIT_TYPE   | System | General<br>Seed  | General<br>Seed  |
| AMS_EVENT_DAY                | System | Five<br>Four<br>Three<br>Two<br>One  | 5<br>4<br>3<br>2<br>1  |
| AMS_EVENT_FULFILL_ON         | System | On_Cancel<br>On_Enroll<br>On_Reg   | On Cancellation<br>On Enrollment<br>On Registration  |

**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| Key                         | Type   | Values  | Meanings   |
|-----------------------------|--------|---|--|
| AMS_EVENT_FULFILL_ON        | System | On_Cancel<br>On_Enroll<br>On_Reg  | On Cancellation<br>On Enrollment<br>On Registration  |
| AMS_EVENT_LEVEL             | System | Main<br>Sub   | Main<br>Sub  |
| AMS_EVENT_PAYMENT_STATUS    | System | Comp<br>Free<br>Invoiced<br>Paid<br>Refunded  | Complimentary<br>Free<br>Invoiced<br>Paid<br>Refunded  |
| AMS_EVENT_PURPOSE           | N/A    | N/A   | (Obsolete)   |
| AMS_EVEH_PURPOSE            | User   | Organization<br>defined values  | Purpose for the Event.   |
| AMS_EVENT_REG_CANCEL_REASON | System | Agenda_Change<br>Cost<br>Personal_Emergency<br>Price_Change<br>Sch_Conflict<br>Speaker_Change<br>Venue_Change<br>Work_Emergency | Agenda Change<br>Cost<br>Personal Emergency<br>Price Change<br>Scheduling Conflict<br>Speaker Change<br>Venue Change<br>Work Emergency |
| AMS_EVENT_REG_SOURCE        | System | Call_Center<br>External<br>On_Site<br>Partner<br>Web  | Call Center<br>External<br>On Site<br>Partner<br>Web   |

**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| <b>Key</b>                   | <b>Type</b> | <b>Values</b>   | <b>Meanings</b>  |
|------------------------------|-------------|---|--|
| AMS_EVENT_REG_STATUS         | System      | Cancelled<br>Enrolled<br>Registered<br>Targeted<br>Waitlisted   | Cancelled<br>Enrolled<br>Registered<br>Targeted<br>Waitlisted  |
| AMS_EVENT_RESOURCE_TYPE      | System      | AMS_People  | People   |
| AMS_EVENT_SCHEDULE_OBJECTIVE | N/A         | N/A   | (Obsolete)   |
| AMS_EVEO_OBJECTIVE           | User        | Organization defined values   | Objective for the Event.   |
| AMS_EVENT_SPEAKER_STATUS     | System      | Booked<br>Cancelled<br>Confirmed<br>Scheduled   | Booked<br>Cancelled<br>Confirmed<br>Scheduled  |
| AMS_EVENT_STATUS             | System      | Active<br>Archived<br>Available<br>Cancelled<br>Closed<br>Completed<br>Denied_BA<br>Denied_TA<br>New<br>On_Hold<br>Submitted_BA<br>Submitted_TA<br>Planning | Active<br>Archived<br>Available<br>Cancelled<br>Closed<br>Completed<br>Denied Budget Approval<br>Denied Concept Approval<br>New<br>Active, but locked<br>Pending Budget Approval<br>Pending Concept Approval<br>Planning |

**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| Key                                  | Type   | Values  | Meanings  |
|--------------------------------------|--------|---|---|
| AMS_EVENT_STREAM_TYPE                | System | A<br>B<br>C<br>D  | A<br>B<br>C<br>D  |
| AMS_EVENT_TYPE<br>(Event Activities) | System | Briefing<br>Conference<br>Exhibition<br>Hospitality<br>Internal_Event<br>Launch<br>Seminar<br>Speaking_Engagement<br>Sponsorship_Event<br>Trade_Show<br>Web_Seminar<br>Workshop | Briefing<br>Conference<br>Exhibition<br>Hospitality<br>Internal Event<br>Launch<br>Seminar<br>Speaking Engagement<br>Sponsorship<br>Trade Show<br>Web Seminar<br>Workshop |
| AMS_EVENT_WAITLIST_ACTION            | System | First_Come_First  | First Come First Served   |

**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| <b>Key</b>             | <b>Type</b> | <b>Values</b>  | <b>Meanings</b>   |
|------------------------|-------------|--|---|
| AMS_FUND_SOURCE        | System      | CAMP<br>EVEH<br>EVEO<br>FUND<br>CSCH<br>DELV<br>EONE<br>OFFR<br>PTNR<br>OPTN<br>VEND<br>USER | Campaign<br>Event<br>Event Schedule<br>Budget<br>Campaign Schedule<br>Deliverable<br>One Off Event<br>Offer<br>Partner<br>Other Partner<br>Vendor<br>Person |
| AMS_FUND_STATUS        | System      | Active<br>Archived<br>Cancelled<br>Closed<br>Draft<br>On_Hold<br>Pending<br>Rejected         | Active<br>Archived<br>Cancelled<br>Closed<br>Draft<br>On Hold<br>Pending Approval<br>Rejected   |
| AMS_FUND_TYPE          | System      | Fixed<br>Fully_Accrued   | Fixed<br>Fully Accrued  |
| AMS_GL_DATE_TYPE       | System      | Claim_Date<br>Due_Date<br>System_Date  | Claim Date<br>Due Date<br>System Date   |
| AMS_GL_EVENT_LINE_TYPE | System      | Accrual_Liability<br>Expense_Account<br>Rec_Clearing<br>Ven_Clearing                         | Accrual Liability<br>Expense Account<br>Receivable Clearing Acct.<br>Vendor Clearing Account  |

**Table B-1 Oracle Marketing Lookup Values (Cont.)**

| Key                      | Type   | Values  | Meanings   |
|--------------------------|--------|---|--|
| AMS_GL_EVENT_STATUS      | System | Accounted<br>Accounted_With_Error<br>Created  | Accounted<br>Accounted with Error<br>Created a New Transaction   |
| AMS_GL_EVENT_TYPE        | System | Accrual<br>Accrual_Adjustment<br>Contra_Charge<br>Settle_By_Credit<br>Settle_By_WO<br>Settle_By_Check | Accrual Liability<br>Accrual Adjustment<br>Settle by Contra Charge<br>Settle by Credit Memo<br>Settle to Writing Off<br>Settle by Payment Voucher  |
| AMS_HISTORY_RULES_OBJECT | System | Claim   | Claim  |
| AMS_IMPORT_STATUS        | System | New<br>Staged<br>Scheduled<br>Completed<br>Purged<br>Cancelled<br>Error                               | New Import<br>Entries are imported and available for viewing<br>Import is setup and ready to be completed at the scheduled time.<br>Import completed.<br>Imported entries have been purged from the Marketing Import Table.<br>The list import has been cancelled and may not be reactivated.<br>An error occurred during list import. |
| AMS_IMPORT_TYPE          | System | Customer<br>Event<br>Lead   | Organizations, Persons and TCA data.<br>Event registration data.<br>Leads data.  |
| AMS_LIST_ACT_TYPE        | User   | Employee List<br>List   | Target group list selection type   |

**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| Key                       | Type   | Values   | Meanings  |
|---------------------------|--------|--|---|
| AMS_LIST_DEDUP_TYPE       | User   | List<br>Import Consumers<br>Import Organizations                 | Type of Deduplication Rules to be applied.  |
| AMS_LIST_GENERATION_TYPE  | System | Incremental<br><br>Standard<br><br>Update<br><br>Update No Purge | New entries added, old entries not deleted, entries not updated<br><br>All old entries deleted, new entries added<br><br>New entries added, old entries not meeting criteria deleted, entry information updated<br><br>New entries added, old entries retained, entry information updated |
| AMS_LIST_ROW_SELECT_TYPE  | System | Nth Record<br>Random<br>Standard                                 | How to select rows during list generation. Standard is top down selection.  |
| AMS_LIST_SEGMENT_STATUS   | User   | Archived<br>Available<br>Cancelled<br>Draft<br>Expired           | Archived<br>Available<br>Cancelled<br>Draft<br>Expired  |
| AMS_LIST_SEGMENT_TYPE     | System | Workbook<br>SQL  | Two types of segments supported. Based on a Discoverer workbook or an SQL statement.  |
| AMS_LIST_SELECTION_ACTION | System | Include<br>Exclude<br>Intersect                                  | How each selection is added to the list. Exclude means that all entries that exist in the excluded list are removed from the current list. Intersect causes the current list to become a list of only those entries which are on the intersected list and the current list.               |

**Table B-1 Oracle Marketing Lookup Values (Cont.)**

| <b>Key</b>                    | <b>Type</b> | <b>Values</b>  | <b>Meanings</b>  |
|-------------------------------|-------------|--|--|
| AMS_LIST_SELECTION_TYPE       | System      | Segment<br>Workbook<br>Import List<br>List<br>SQL  | Segment<br>Workbook<br>Import List<br>List<br>SQL  |
| AMS_LIST_STATUS               | System      | Archived<br>Available<br>Cancelled<br>Draft<br>Executed<br>Executing<br>Generating<br>Locked<br>New<br>Pending<br>Reserved<br>Scheduled<br>Validated<br>Validating | Archived<br>Available<br>Cancelled<br>Draft<br>Executed<br>Executing<br>Generating<br>Locked<br>New<br>Pending<br>Reserved<br>Scheduled<br>Validated<br>Validating |
| AMS_LIST_TYPE                 | System      | Manual List<br>Standard List<br>Suppression List<br>Target Group   | List of possible list types. Note where these appear in the program.   |
| AMS_LUMPSUM_DISTRIBUTION_TYPE | System      | %<br>Amt<br>Qty  | Percent<br>Amount<br>Quantity  |
| AMS_MASTER_OBJECT_TYPE        | System      | Camp<br>CSCH<br>EONE<br>EVEH   | Campaign<br>Campaign Schedule<br>One-Off Event<br>Event  |



**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| <b>Key</b>                    | <b>Type</b> | <b>Values</b>  | <b>Meanings</b>   |
|-------------------------------|-------------|--|---|
| AMS_MEDIA_TYPE                | System      | Broadcast<br>Deal<br>Direct_Marketing<br>Events<br>Internet<br>In_Store<br>Public_Relations<br>Trade_Promotion | Advertising<br>Deal<br>Direct Marketing<br>Events<br>Web Marketing<br>In Store<br>Press and Analyst Relations<br>Trade Promotions |
| AMS_OBJECT_CLASS              | System      | Invoice<br>Order<br>Order_line<br>PCHO   | Invoice<br>Order<br>Order Line<br>Purchase Order  |
| AMS_OBJECT_USAGE_TYPE         | System      | Created<br>Used_By   | Created<br>Used By  |
| AMS_OFFER_DEAL_CUSTOMER_TYPES | Extensible  | Buyer<br>Customer<br>List<br>Segment   | Buyer Group<br>Customer<br>List<br>Segment  |
| AMS_OFFER_LUMPSUM_PAYMENT     | System      | Accrue<br>Check  | Accrue<br>Issue Check   |

**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| Key   | Type   | Values   | Meanings   |
|---|--------|--|--|
| AMS_OFFER_STATUS                            | System | Active<br>Closed<br>Draft<br>Rejected<br>Closed<br>Pending<br>Pending_Active<br>Archived<br>Cancelled<br>Completed<br>Terminated<br>Onhold | Active<br>Closed<br>Draft<br>Budget Rejected<br>Closed<br>Pending budget approval<br>Pending Active<br>Archived<br>Cancelled<br>Completed<br>Terminated<br>On hold |
| AMS_OFFER_TYPE                              | System | OID<br>Lumpsum<br>Order<br>Accrual<br>Off_Invoice<br>Deal<br>Terms   | Promotional Goods<br>Lump sum<br>Order value<br>Accruals<br>Off Invoice<br>Trade Deal<br>Terms Upgrade   |
| AMS_OFFER_LUMP_CUST_TYPES                   | System | Buyer<br>Customer  | Buyer<br>Customer  |
| AMS_PARTNER_HOLDING_TYPE<br>(Holding Owner) | System | PTNR<br>VEND   | Partner<br>Vendor<br><br>Only used when Partners Online is implemented.  |
| AMS_PAYMENT_STATUS                          | System | Incomplete<br>Interfaced<br>Paid<br>Pending  | Incomplete<br>Interfaced<br>Paid<br>Pending  |

**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| Key  | Type       | Values   | Meanings   |
|--|------------|--|--|
| AMS_PLCE_<br>LOCATION_CODE                   | Extensible | Left1,<br>Left2...Left7<br><br>Right1, Right2 ...<br>Right7<br><br>Top<br>Bottom   | Positions for placements   |
| AMS_PLCE_SITE_<br>CATEGORY                   | System     | Oracle_<br>Applications<br><br>Other_<br>Applications<br><br>Affiliates  | Oracle Applications<br>Other Applications<br>Affiliates  |
| AMS_POST_AUDIENCE_<br>TYPE                   | System     | S<br><br>L   | Segment<br>List  |
| AMS_POST_BUSPRIOR<br><br>(Business Priority) | System     | None<br><br>Random<br><br>Prod_list_price<br><br>Campaign_Start_<br>Date<br><br>Campaign_End_<br>Date<br><br>Campaign_<br>Priority | None<br><br>Random (for all)<br><br>List Price (for products only)<br><br>Start Date, End Date, or Priority (for<br>campaign schedules). |
| AMS_POST_CATEGORY                            | System     | Universal<br><br>Rulebased   | Posting types: Universal or based on a rule.   |
| AMS_POST_CND_<br>DATA_TYPE                   | System     | Float<br><br>String  | Data Types returnable by Custom<br>Condition Class.  |
| AMS_POST_COMP_<br>OPERATOR                   | System     | EQ<br><br>GTE<br><br>LTE   | Equal to<br><br>Greater than or equal to<br><br>Less than or equal to<br><br>Used to compare shopping cart amount.                       |

**Table B-1 Oracle Marketing Lookup Values (Cont.)**

| Key                          | Type   | Values  | Meanings   |
|------------------------------|--------|---|--|
| AMS_POST_CONTENT_TYPES       | System | Product<br>Offer<br>Schedule                                      | Product<br>Web Offer<br>Web Advertisement  |
| AMS_POST_PREDEF_PROD_CONTEXT | System | Prod_viewed<br>Prod_in_cart                                       | The product context for relationship based strategy.   |
| AMS_POST_RELATIONSHIPS       | System | Promoting<br>Relationship<br>types not covered<br>by iStore       | Promoting is a relationship not covered by iStore, as in promoting a product.  |
| AMS_POST_STATUS              | System | Active<br>Inactive  | -  |
| AMS_POST_STRATEGY_TYPE       | System | Manual_Selection<br>Product_Relationship<br>Inferred_OP<br>Custom | Manually selected strategy<br>Strategy based on product relationship<br>Inferred based on Personalization<br>Custom strategy |
| AMS_PRICE_LIST_STATUS        | System | Active<br>Draft<br>Rejected<br>Pending<br>Cancelled               | Active<br>Draft<br>Rejected<br>Pending Budget Approval<br>Cancelled  |
| AMS_PRIOR_SORT_ORDER         | System | Asc<br>Desc   | Ascending<br>Descending  |
| AMS_PRIORITY                 | System | Fast_Track<br>High<br>Standard                                    | Fast Track<br>High<br>Standard   |
| AMS_PRODUCT_LEVEL            | System | Product<br>Family   | Product<br>Product Family  |
| AMS_PROGRAM_OBJECTIVE        | User   | User Defined  | -  |

**Table B-1 Oracle Marketing Lookup Values (Cont.)**

| Key                        | Type       | Values   | Meanings  |
|----------------------------|------------|--|---|
| AMS_PROGRAM_STATUS         | System     | Active<br>Archived<br>Cancelled<br>Completed<br>New<br>On_Hold | Active<br>Archived<br>Cancelled<br>Completed<br>New<br>Active, but locked                   |
| AMS_QP_ARITHMETIC_OPERATOR | System     | %<br>Amt<br>Lumpsum<br>Newprice                                | Percent<br>Amount<br>Lump sum<br>New Price  |
| AMS_QP_VOLUME_TYPE         | System     | Pricing_Attribute10<br>Pricing_Attribute12                     | Quantity<br>Amount  |
| AMS_QUARTERS               | System     | Q1<br>Q2<br>Q3<br>Q4   | Q1<br>Q2<br>Q3<br>Q4  |
| AMS_REASON_CODE_TYPE       | User       | Adjust_Reason<br>Invoicing_Reason                              | Adjustment Reason<br>Invoicing Reason   |
| AMS_ROLLUP_TYPE            | Extensible | Coll<br>Deal<br>ECAM<br>EVCAM<br>Partner<br>RCAM<br>TRDP       | Collection<br>Deal<br>Campaign<br>Event Promotions<br>Partner<br>Program<br>Trade Promotion |
| AMS_SCHEDULE_OBJECTIVE     | User       | User Defined   | -   |
| AMS_TRANSFER_REASON        | User       | Sourcing   | Initial Sourcing  |

**Table B-1 Oracle Marketing Lookup Values (Cont.)**

| Key                         | Type       | Values  | Meanings   |
|-----------------------------|------------|---|--|
| AMS_TRANSFER_TYPE           | Extensible | Release<br>Reserve<br>Transfer<br>Request<br>Utilized               | Release<br>Reserve<br>Transfer<br>Request<br>Utilized  |
| AMS_TRIGGER_CHK_METRIC_TYPE | System     | Actual<br>Forecast  | Actual Value<br>Forecast Value   |
| AMS_TRIGGER_CHK_TYPE        | System     | DIWB<br>Metric<br>Static_Value                                      | Workbook<br>Metric<br>Static Value   |
| AMS_TRIGGER_FREQUENCY_TYPE  | System     | Daily<br>Hourly<br>Monthly<br>None<br>Quarterly<br>Weekly<br>Yearly | The frequency of trigger checking  |
| AMS_TRIGGER_TYPE            | System     | Metric_Metric<br>Metric_Value<br>Metric_Workbook                    | Metric to Metric type trigger<br>Metric to Value type trigger<br>Metric to Workbook type trigger |
| AMS_UTILIZATION_TYPE        | System     | Accrual<br>Adjustment<br>Sales_Accrual<br>Utilized                  | Accrual<br>Adjustment<br>Sales Accrual (refers to the salesperson)<br>Utilized                   |
| AMS_VALUE_LIMIT             | Extensible | Balance<br>Committed<br>Paid<br>Planned<br>Utilized                 | Balance<br>Committed<br>Paid<br>Planned<br>Utilized  |

**Table B–1 Oracle Marketing Lookup Values (Cont.)**

| Key       | Type   | Values | Meanings |
|-----------|--------|--------|----------|
| AMS_YEARS | System | 1995   | 1995     |
|           |        | 1996   | 1996     |
|           |        | 1997   | 1997     |
|           |        | 1998   | 1998     |
|           |        | 1999   | 1999     |
|           |        | 2000   | 2000     |
|           |        | 2001   | 2001     |
|           |        | 2002   | 2002     |

**Table B–1   Oracle Marketing Lookup Values (Cont.)**

| Key                        | Type       | Values  | Meanings                       |
|----------------------------|------------|---|--------------------------------|
| IBE_RELATIONSHIP_TYPES     | Extensible | Possible relationships between Products like Cross Sell, Up Sell. | This is an iStore lookup type. |
| INVENTORY_ITEM_STATUS_CODE | User       | ACTIVE<br>INACTIVE  | Active<br>Inactive             |



**Table B–1 Oracle Marketing Lookup Values (Cont.)**

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



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## Oracle Marketing Request Set and Concurrent Program Reference

This appendix provides a table of the Request Sets and Concurrent Manager Programs used by Oracle Marketing.

Topics include:

- [Section C.1, "Running Concurrent Programs"](#)
- [Section C.2, "Checking Concurrent Program Status"](#)
- [Section C.3, "Oracle Marketing Request Sets"](#)
- [Section C.4, "Oracle Marketing Concurrent Program Reference"](#)

## C.1 Running Concurrent Programs

Many operational processes for Oracle Marketing require Concurrent Programs to run. They can run on a scheduled basis or on an as required basis. Use the following instructions for running any Oracle Applications concurrent program or program set.

See the *Oracle Applications System Administrator's Guide* for complete details on Oracle Applications concurrent programs.

### Prerequisites

None

### Steps

1. Log in to Oracle Forms with appropriate responsibility. The Submit a New Request Form automatically opens.  
  
For Oracle applications concurrent programs, the responsibility varies by module.
2. Choose Single Request (if running a single concurrent program) or Request Set (if running a set of concurrent programs).
3. Select **OK**. The Submit Request form opens.
4. Query for the appropriate concurrent program, if necessary.
5. Enter run immediately or select Schedule to schedule batch jobs.
6. If scheduling, select the time frame:
  - As soon as Possible: Select this option if running the program immediately.
  - Once: Select this option to run the program(s) one at a time.
  - Periodically or On Specific Days: Select this option to run the program on a schedule that you will later specify.
7. Select **Submit** to submit the request.

## C.2 Checking Concurrent Program Status

Use the following procedure to check the status of a concurrent program.

### Prerequisites

None

### Steps

1. Log in to Oracle Forms with System Administrator Responsibility.
2. Choose Concurrent > Request.  
The Find Request window (defaulted to “All My Requests”) opens.
3. In the Find Request window, search for your concurrent program request.
  - If the server is not busy, then selecting Find may be the fastest way to find your request.
  - If the server is busy, it may be better to enter search criteria and look for Specific Requests.
4. The Request window displays a list of submitted requests. The Oracle Marketing concurrent programs should be listed.
5. Select Refresh Data occasionally to check the completion status.
6. Once in the “red” state or Phase = “completed” the “View Output” and “View Log” buttons will become active (if the log output files have been setup correctly).

## C.3 Oracle Marketing Request Sets

Request sets are sets of concurrent manager programs which may be executed as a group. If desired, any concurrent manager program which is part of a request set may be executed individually.

**Table C–1   Oracle Marketing Request Sets**

| Request Set Name                             | Concurrent Manager Programs  |
|--|--|
| BIM: Load Marketing Facts for the First Time | BIM: Load Marketing Facts for the First Time, Object to Load: Campaign<br>BIM: Load Marketing Facts for the First Time, Object to Load: Event<br>BIM: Load Marketing Facts for the First Time, Object to Load: Budget<br>BIM: Load Marketing Facts for the First Time, Object to Load: Leads<br>BIM: Load Marketing Facts for the First Time, Object to Load: Lead_Import<br>BIM: Load Marketing Facts for the First Time, Object to Load: Response<br>BIM: Load Key Performance Indicator Facts |
| BIM: Initial Build of Materialized Views     | BIM: Initial Build of Campaign Materialized Views<br>BIM: Initial Build of Event Materialized Views<br>BIM: Initial Build of Budget Materialized Views<br>BIM: Initial Build of Key Performance Indicators Materialized Views<br>BIM: Initial Build of Interaction History Responses Materialized Views  |

**Table C–1 Oracle Marketing Request Sets (Cont.)**

| <b>Request Set Name</b>                              | <b>Concurrent Manager Programs</b>  |
|--|---|
| BIM: Refresh Materialized Views                      | BIM: Refresh Campaign Materialized Views<br>BIM: Refresh Event Materialized Views<br>BIM: Refresh Budget Materialized Views<br>BIM: Refresh Key Performance Indicators Materialized Views<br>BIM: Refresh Marketing Activities Materialized Views<br>BIM: Refresh of Interaction History Responses Materialized Views   |
| BIM: Refresh Materialized Views - Lead Intelligence  | BIM: Refresh Summary by Group Hierarchy Materialized Views<br>BIM: Refresh of Lead KPI Materialized Views<br>BIM: Refresh of Lead Quality Materialized Views<br>BIM: Refresh of Lead Sources Materialized Views<br>BIM: Refresh of Lead Import Materialized Views<br>BIM: Refresh of Responses Materialized Views   |
| BIM: Load Marketing Facts from Previous Refresh Date | BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Campaign<br>BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Event<br>BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Budget<br>BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Leads<br>BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Lead_Import<br>BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Response<br>BIM: Load Key Performance Indicator Facts from Previous Refresh Date |

## C.4 Oracle Marketing Concurrent Program Reference

The table below indicates the Concurrent Manager programs for Oracle Marketing.

**Table C-2 Oracle Marketing Concurrent Manager Programs**

| <b>Concurrent Manager</b>                                | <b>Required</b> | <b>Description</b>   |
|--|-----------------|--|
| Activate Event Schedules                                 | Yes             | <p>This will pick up all the Event Schedules which are in Available status and for which the start date has passed and its Event is active and make the Schedule Active. For Events, run the program <b>Activate Event Schedules</b>. This program accomplishes two things:</p> <ul style="list-style-type: none"> <li>▪ <b>Activates Events:</b> This program activates available event schedules and one-off events for which the start date has passed.</li> <li>▪ <b>Completes Events:</b> Picks up and completes event schedules and one-off events for which the end date has passed.</li> </ul> |
| AMS Activate Schedule                                    | Optional        | This will pick up all the Campaign Schedules which are in Available status and for which the start date has passed and its Campaign is active and make the Schedule Active.  |
| AMS: Complete Campaign Schedules                         | Optional        | <p>This program accomplishes the following:</p> <ul style="list-style-type: none"> <li>▪ Picks up available schedules with a start date of today (or, a start date that has already passed) and activates them.</li> <li>▪ Picks up active schedules with an end date of today (or, an end that that has passed) and completes them.</li> </ul>  |
| AMS Expire Data Mining Models                            | Yes             | Background process that monitors data mining models to see if they have expired. A frequency of once a day should be sufficient.   |
| AMS: Generate Suppression list                           | Optional        | Updates and maintains organization defined suppression lists. This is in addition to seeded suppression lists.   |
| AMS Group Access Refresh                                 | Yes             | Updates denormalized tables with group information. Should be run on a periodic basis according the organization's Business Rules.   |
| AMS Web Execution: Specialty Store Items Refresh Program | Yes             | Refreshes the denormalized table for minisites periodically to capture items in the iStore minisites.  |
| AMS Web Execution: Campaign Items Refresh Program        | Yes             | Information about Campaigns is stored in multiple tables. To improve runtime performance, this program periodically collects required information on campaigns and places it into a single table.  |



**Table C–2 Oracle Marketing Concurrent Manager Programs (Cont.)**

| <b>Concurrent Manager</b>                                    | <b>Required</b>                          | <b>Description</b>   |
|--|--|--|
| OZF - TM: Trade Management Activities (Offers and Schedules) | Required if using Offers and Web Posting | Refreshes the Offer Denormalized tables. Marketing Online offers functionality will retrieve the Eligible Offers for any Products depending For Qualifying parties.  |
| AMS Load Inventory Categories                                | Yes                                      | Loads categories from the MTL schema to the AMS schema denormalized tables. This program should be run if and when a new category is created in Inventory.   |
| AMS : Interface Marketing Objects to Calendar                | Yes                                      | Before the new object or criteria will display on the Marketing Calendar, you must run the concurrent program This program is a workflow background process and will update the Calendar as needed.  |
| Load Catalog Hierarchy                                       | Yes                                      | <p>Next, run <b>Load Catalog Hierarchy</b> from the Catalog Manager responsibility. This enables categories defined for Products to be visible to the Marketing applications. Only categories with the following parameters will be pulled into this view:</p> <ul style="list-style-type: none"> <li>■ FORECASTABLE_FLAG = Y</li> <li>■ PURCHASE_INTEREST = Y</li> </ul>  |
| AMS - Metrics refresh program                                | Optional                                 | <p>Refreshes Metrics. There is an optional parameter to record metrics history. Update History.</p> <p>Metric history records the activity metric records on a daily basis. History is recorded by the AMS: Metric Refresh Program only when the Update_history flag is set to Yes.</p> <p>The refresh must be executed on a daily basis for the history to be recorded. If Update_History has been set to No, then no history will be recorded. The history is recorded for each metric as a single record for a given day. If the metric record is updated more than once in a day, only the last value of that day is recorded. If a metric is not updated on a given day then no history is recorded.</p> <p>The history can be shown by the history section on the Metrics and Cost &amp; Revenue side navigation menus. Select the Metric Name, Start and End dates, Interval Value Type (cumulative or incremental), then select View History to show a table of values and charts. Recording history is required for support of Business Intelligence for Marketing (BIM).</p> |

**Table C-2 Oracle Marketing Concurrent Manager Programs (Cont.)**

| <b>Concurrent Manager</b>          | <b>Required</b> | <b>Description</b>   |
|------------------------------------|-----------------|--|
| Metrics Background Process         | -               | <p>Use this request set to populate data for updating bin and graph data in the Campaign Workbench:</p> <ul style="list-style-type: none"> <li>■ Top Performing Campaigns Bin</li> <li>■ Bottom Performing Campaign Bin</li> <li>■ Trend Graph</li> </ul> <p>It is recommended that you schedule this request set to run daily -- it has two concurrent programs:</p> <ul style="list-style-type: none"> <li>■ <b>Refresh the metric:</b> Enter "Yes" in parameter to collect history.</li> <li>■ <b>Populate the denorm table:</b> If "Yes" is entered in parameter , the program will be run in incremental mode. For example, just update mvs for the data updated since last time.</li> </ul> <p>The Top and Bottom performing bins/Trend graph are found in the Campaign Workbench (shown below).</p> |
| AMS Portal Cache Daemon            | Yes             | Populates the Marketing subtab on the Home tab.  |
| AMS: Purge Imported List           | Optional        | <p>During the import process, the user may specify an expiration date or number of uses for a list. This program removes those entries whose expiration date has passed or number of uses reached.</p> <p>Optional Parameter: force_purge_flag. This parameter indicates whether to purge a record regardless of the associated campaign status. The default value is No.</p>  |
| AMS: Purge Target Group            | Optional        | After a target group has been generated and used, this program lets a user purge the list entries.   |
| AMS: Refresh Party Market Segments | Optional        | Generates a list of parties in the segment. This program also updates the size information for all segments so a history of segment sizes may be maintained.   |
| AMS Team Access Refresh            | Yes             | Updates denormalized tables with team information. Should be run on a periodic basis according to the organization's Business Rules.   |
| AMS-TM: Adjust Backdated Offer     | Yes             | Concurrent program to adjust backdated offers. This should be run after running the AMS-TM: Funds Accrual Engine concurrent program.   |

**Table C-2 Oracle Marketing Concurrent Manager Programs (Cont.)**

| <b>Concurrent Manager</b>   | <b>Required</b> | <b>Description</b>  |
|---|-----------------|---|
| AMS-TM:<br>Funds<br>Accrual<br>Engine                                     | Yes             | <p>Ability to calculate budget utilization and earnings based on ship confirmed orders (provided the offer's phase is set to 'Ship', else the accruals will be calculated at the phase the offer is applied).</p> <p>In case of Fully Accrued type of Budgets with accrue to is 'customer', Budget, Committed and Earned columns are to be updated with the accrued amount. But in case of budgets with accrue to 'Sales', only Budget column will have to be updated. Committed and Earned should not be populated. This allows users to transfer money from Fully accrued budget to any other Fixed Budgets. If max cap is specified against the Fully accrued budget, the budget can be accumulated only to the level of max cap.</p> <p>Parameters: p_run_exception. Set to Y to run Order Management Except Queue.</p> |
| AMS-TM:<br>Import<br>Territory<br>Hierarchy                               | Yes             | <p>This concurrent program uploads the hierarchy data from jtf_territories to AMS schema to be able to perform budget allocation to that territory hierarchy. The concurrent program expects a hierarchy id meaning which particular hierarchy the user wants to import.</p> <p>Parameters: Hierarchy Id</p>  |
| AMS-TM:<br>Release<br>Committed<br>Budget<br>Amount After<br>Grace Period | Yes             | <p>A budget has been committed for an offer or any other activity. The Activity or offer date has ended or the offer is going to be closed or canceled. There might be a situation that the budget has not been utilized completely. This feature can be implemented through a concurrent process would return back the unused committed amount back to the sourcing budget. If there is a grace period, release of committed amount from a fixed type fund would take place whenever a offer is closed or canceled after the attainment of the grace period.</p> <p>Parameters: p_object_type (Object Type, for example, CAMP, OFFR, EVEH)</p>   |
| AMS-TM:<br>Validate<br>Budget<br>Thresholds                               | Yes             | <p>Threshold Alert provides the feature to monitor over spending or under spending from time to time. The concurrent program performs the automatic process of verification and notifies the owner of the budget on over &amp; under utilization.</p> <p>Parameters: None</p>   |
| AMS-TM<br>Utilize<br>Lumpsum<br>Offers                                    | Yes             | <p>A user initiated background process that will account budget utilizations against lumpsum offer whenever the offer start date arrives rather than on offer approved or created date.</p> <p>In case when the Offer is active on the date when Offer was created, then the budget utilization will be updated immediately.</p>  |

**Table C-2 Oracle Marketing Concurrent Manager Programs (Cont.)**

| <b>Concurrent Manager</b>                                      | <b>Required</b> | <b>Description</b>   |
|--|-----------------|--|
| AMS-TM:<br>Claims Aging<br>Population                          | Yes             | <p>Claims aging program populates the summary table for the claims aged by customer for an aging bucket. Aging will be run based on the system date. This program has to be run on a daily basis to get the daily aging analysis for the customers.</p> <p>Claims may be aged using a future type. This type will display claims that will become due, based on the Due Date, the specified number of days in the future.</p> <p>Parameter: Aging bucket defined in Oracle Receivables</p> |
| AMS-TM:<br>Claims<br>Autopay                                   | Yes             | <p>Autopay program is used to pay accruals on a regular basis to customers. Autopay can be set up to pay accruals based on a customer, budget, campaign or offer.</p> <p>Parameters:</p> <ul style="list-style-type: none"> <li>■ Customer</li> <li>■ Budget</li> <li>■ Offer</li> <li>■ Campaign</li> </ul>   |
| AMS-TM:<br>Claims<br>Settlement<br>Fetcher                     | Yes             | <p>Settlement fetcher gets the settlement data created in receivables and payables after settling a claim. Claim settlement on a manual claims gets created through autoinvoice or payables invoice import. These are programs which run on a batch mode and after the actual payment gets created in receivables or payables, settlement fetcher has to be run to get the settlement data to be shown in claims.</p> <p>Parameters: None</p>  |
| AMS-TM:<br>Import Claims                                       | Yes             | <p>Import Claims imports the data from interface tables into claims. This program runs through the standard validations for claims creation and rejects the claims that are not successful for import.</p> <p>Parameters: None</p>   |
| AMS-TM:<br>Perform<br>Recalculated<br>Commitment<br>for Offers | Optional        | Performs recalculation of committed budget for offers.   |

**Table C-2 Oracle Marketing Concurrent Manager Programs (Cont.)**

| <b>Concurrent Manager</b>                                | <b>Required</b> | <b>Description</b>  |
|--|-----------------|---|
| AMS-TM:<br>Transfer to General Ledger                    | Yes             | Transfer to General Ledger is run to transfer the sub-ledger accounting entries created by claims/accruals into General Ledger accounting tables.<br><br>Parameters: <ul style="list-style-type: none"> <li>■ Selection Type (1-Batch Transfer)</li> <li>■ Set Of Books - Primary set of books</li> <li>■ Transfer Reporting Books - Yes/No</li> <li>■ Batch Name - Name of batch for transfer</li> </ul> |
| AMS Update Data Mining Models                            | Optional        | Updates detail information collected on parties. The frequency should be the same as the BIC Summary Extraction process.  |
| AMS Web Execution: Specialty Store Items Refresh Program | Yes             | This refreshes the denormalized table for minisites periodically to capture items in the iStore minisites.  |
| AMS Web Execution: Campaign Items Refresh Program        | Yes             | Information about Campaigns is stored in multiple tables. To improve runtime performance, this program periodically collects required information on campaigns and places it into a single table.   |
| AMS Web Execution: Refresh Offer Parties and Products    | Yes             | This program loads offer party and product information into denormalized tables. This information will be used in validating budget eligibility and Web offer recommendations.  |
| AutoInvoice - Oracle Receivables                         | Yes             | AutoInvoice is an Oracle Receivables concurrent program used to create credit memos/debit memos in receivables. It is used for creating credit memos on settling manual claims. Claims settled with receivables payment method gets created with the batch source defined in system parameters. For more information on parameters and options see the Oracle Receivables Implementation Guide.           |

**Table C-2 Oracle Marketing Concurrent Manager Programs (Cont.)**

| <b>Concurrent Manager</b>                                | <b>Required</b> | <b>Description</b>  |
|--|-----------------|---|
| BIM: Load Marketing Facts for the First Time             | Optional        | Loads all Facts for the first time. Repeat for each object: Campaign, Event, Budget, Leads, Lead Import and Response.<br>Parameters:<br>Start Date<br>End Date<br>Part of the Request Set: BIM: Load Marketing Facts for the First Time                         |
| BIM: Load Marketing Facts from the Previous Refresh Date | Optional        | Loads all Facts from the Previous Refresh Date. Repeat for each object: Campaign, Event, Budget, Leads, Lead Import and Response.<br>Parameters:<br>Start Date<br>End Date<br>Part of the Request Set: BIM: Load Marketing Facts from the Previous Refresh Date |
| BIM: Load Key Performance Indicator Facts                | Optional        | Loads KPI Facts.<br>Part of the Request Set: BIM: Load Marketing Facts for the First Time   |
| BIM: Initial build of Campaigns Materialized Views       | Optional        | Prepares pre-built tables for Campaign Materialized Views<br>Parameters:<br>Number of Parallel Processors: 4<br>Part of the Request Set: BIM: Initial build of Materialized Views   |
| BIM: Initial build of Events Materialized Views          | Optional        | Prepares pre-built tables for Events Materialized Views<br>Parameters:<br>Number of Parallel Processors: 4<br>Part of the Request Set: BIM: Initial build of Materialized Views   |
| BIM: Initial build of Budgets Materialized Views         | Optional        | Prepares pre-built tables for Budgets Materialized Views<br>Parameters:<br>Number of Parallel Processors: 4<br>Part of the Request Set: BIM: Initial build of Materialized Views  |

**Table C-2 Oracle Marketing Concurrent Manager Programs (Cont.)**

| <b>Concurrent Manager</b>   | <b>Required</b> | <b>Description</b>  |
|---|-----------------|---|
| BIM: Initial build of Interaction History Materialized Views        | Optional        | Prepares pre-built tables for Interaction History Materialized Views<br>Parameters:<br>Number of Parallel Processors: 4<br>Part of the Request Set: BIM: Initial build of Materialized Views        |
| BIM: Initial build of Key Performance Indicators Materialized Views | Optional        | Prepares pre-built tables for Key Performance Indicators Materialized Views<br>Parameters:<br>Number of Parallel Processors: 4<br>Part of the Request Set: BIM: Initial build of Materialized Views |
| BIM: Initial build of Leads Quality Materialized Views              | Optional        | Prepares pre-built tables for Leads Quality Materialized Views<br>Part of the Request Set: BIM: Initial build of Materialized Views - Lead Intelligence   |
| BIM: Initial build of Leads Sources Materialized Views              | Optional        | Prepares pre-built tables for Leads Sources Materialized Views<br>Part of the Request Set: BIM: Initial build of Materialized Views - Lead Intelligence   |
| BIM: Initial build of Lead Import Materialized Views                | Optional        | Prepares pre-built tables for Lead Import Materialized Views<br>Part of the Request Set: BIM: Initial build of Materialized Views - Lead Intelligence   |
| BIM: Initial build of Responses Materialized Views                  | Optional        | Prepares pre-built tables for Responses Materialized Views<br>Part of the Request Set: BIM: Initial build of Materialized Views - Lead Intelligence   |
| BIM: Refresh Campaign Materialized Views                            | Optional        | Builds Campaigns Materialized views<br>Parameters:<br>Number of Parallel Processors: 4<br>Part of the Request Set: BIM: Refresh of Materialized Views   |

**Table C-2 Oracle Marketing Concurrent Manager Programs (Cont.)**

| <b>Concurrent Manager</b>                                  | <b>Required</b> | <b>Description</b>   |
|--|-----------------|--|
| BIM: Refresh Events Materialized Views                     | Optional        | Builds Events Materialized views<br>Parameters:<br>Number of Parallel Processors: 4<br>Part of the Request Set: BIM: Refresh of Materialized Views                     |
| BIM: Refresh Budgets Materialized Views                    | Optional        | Builds Budgets Materialized views<br>Parameters:<br>Number of Parallel Processors: 4<br>Part of the Request Set: BIM: Refresh of Materialized Views                    |
| BIM: Refresh of Interaction History Materialized Views     | Optional        | Builds Interaction History Materialized views<br>Parameters:<br>Number of Parallel Processors: 4<br>Part of the Request Set: BIM: Refresh of Materialized Views        |
| BIM: Refresh Key Performance Indicators Materialized Views | Optional        | Builds Key Performance Indicators Materialized views<br>Parameters:<br>Number of Parallel Processors: 4<br>Part of the Request Set: BIM: Refresh of Materialized Views |
| BIM: Refresh Marketing Activities Materialized Views       | Optional        | Builds Marketing Activities Materialized Views<br>Parameters:<br>Number of Parallel Processors: 4<br>Part of the Request Set: BIM: Refresh of Materialized Views       |
| BIM: Refresh of Summary by Group Hierarchy                 | Optional        | Builds summarized tables based on group hierarchy.<br>Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence                                  |
| BIM: Refresh of Leads KPI Materialized Views               | Optional        | Builds Leads KPI Materialized Views.<br>Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence  |



**Table C-2 Oracle Marketing Concurrent Manager Programs (Cont.)**

| <b>Concurrent Manager</b>  | <b>Required</b> | <b>Description</b>  |
|--|-----------------|---|
| BIM: Refresh of Leads Quality Materialized Views                     | Optional        | Builds Leads Quality Materialized Views.<br>Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence   |
| BIM: Refresh of Leads Sources Materialized Views                     | Optional        | Builds Leads Sources Materialized Views.<br>Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence   |
| BIM: Refresh of Lead Import Materialized Views                       | Optional        | Builds Lead Import Materialized Views.<br>Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence   |
| BIM: Refresh of Responses Materialized Views                         | Optional        | Builds Responses Materialized Views.<br>Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence   |
| BIM: Load Marketing Facts from previous refresh date                 | Optional        | Loads all facts from the previous refresh date. Repeat for each object: Campaign, Event, Budget.<br>Parameters:<br>Object to Load: Campaign<br>End Date<br>Number of Parallel Processors: 4<br>Part of the Request Set: Load Marketing Facts from previous refresh date |
| BIM: Load Key Performance Indicator facts from previous refresh date | Optional        | Loads all KPI facts from the previous refresh Date.   |
| Initial Build of Campaigns mvs                                       | -               | Obsolete in Release 7.<br>Replaced by BIM: Initial Build of Campaigns Materialized Views.   |
| Initial Build of Events mvs  | -               | Obsolete in Release 7.<br>Replaced by BIM: Initial Build of Events Materialized Views.  |

**Table C-2 Oracle Marketing Concurrent Manager Programs (Cont.)**

| <b>Concurrent Manager</b>                          | <b>Required</b> | <b>Description</b>  |
|--|-----------------|---|
| Initial Build of Funds mvs                         | -               | Obsolete in Release 7.<br>Replaced by BIM: Initial Build of Budgets Materialized Views.   |
| Load Geographic Hierarchies                        | Yes             | This program must be run each time that the geographies are changed.  |
| Marketing Facts Load                               | -               | Obsolete in Release 7.<br>Replaced by BIM: Load Marketing Facts for the First Time.   |
| Marketing Materialized views prebuilt tables (AMS) | -               | Obsolete in Release 7.<br>Replaced by BIM: Initial Build of Materialized Views  |
| Marketing Materialized views Refresh (AMS)         | -               | Obsolete in Release 7.<br>Replaced by BIM: Refresh Materialized Views   |
| Payables Open Interface Import - Oracle Payables   | Yes             | Payables open interface import is an Oracle Payables concurrent program used to create invoices in payables. It has to be run for the batch source defined in system parameters since all the claims settlement for payables get created with that batch source. For more information on parameters and options see the Oracle Payables Implementation Guide. |
| Refresh of Campaigns mvs                           | -               | Obsolete in Release 7.<br>Replaced by BIM: Refresh Campaigns Materialized Views.  |
| Refresh of Events mvs                              | -               | Obsolete in Release 7.<br>Replaced by BIM: Refresh Events Materialized Views.   |

**Table C–2 Oracle Marketing Concurrent Manager Programs (Cont.)**

| <b>Concurrent Manager</b>   | <b>Required</b> | <b>Description</b>  |
|-----------------------------|-----------------|---|
| Refresh of Funds mvs        | -               | <p>Obsolete in Release 7.</p> <p>Replaced by BIM: Refresh Budgets Materialized Views.</p>   |
| Workflow Background Process | Required        | <p>The System Administrator must run this program.</p> <p>For lists purposes, this background process makes a list active. It populates List generation and target group generation data. For <b>list generation</b>, it requires the following parameters:</p> <ul style="list-style-type: none"> <li>■ Item Type: AMS List Generation</li> <li>■ Yes Process Timeout : yes</li> <li>■ Process Stuck: yes</li> <li>■ Ignore Minimum and Maximum Thresholds</li> </ul> <p>For <b>data mining</b>, this process must be run with the following parameters:</p> <ul style="list-style-type: none"> <li>■ Item Type: AMS Data Mining - Build/Score/Preview</li> <li>■ Minimum Threshold: Leave blank.</li> <li>■ Maximum Threshold: Leave blank.</li> <li>■ Process Deferred: Yes</li> <li>■ Process Timeout: Yes</li> <li>■ Process Stuck: Yes</li> </ul> <p>For the Workflow daemon to monitor data mining workflow requests, a frequency of 30 minutes should be sufficient.</p> <p>For budget approval purposes, the workflow background process must run with the following parameters:</p> <ul style="list-style-type: none"> <li>■ Set Item Type: AMS Marketing Approvals</li> <li>■ Minimum Threshold: Leave blank.</li> <li>■ Maximum Threshold: Leave blank.</li> <li>■ Process Deferred: Yes</li> <li>■ Process Timeout: Yes</li> </ul> |

**Table C–2 Oracle Marketing Concurrent Manager Programs (Cont.)**

| Concurrent Manager       | Required | Description   |
|--------------------------|----------|---|
| Trigger Workflow Process | Yes      | <p>The Trigger Workflow process is associated with an item type called OMO Triggers. This item type identifies all workflow processes that are needed to enable the Marketing Trigger functionality.</p> <p>Currently there are four different processes in the OMO Triggers item type:</p> <p>Trigger Process: The main process -- getting run as a subscription to the Workflow Business Event OMO Trigger Event (oracle.apps.ams.trigger.TriggerEvent).</p> <p>The following processes are sub flows of this main process flow.</p> <ul style="list-style-type: none"><li>– Perform All Actions</li><li>– Execute Schedule</li><li>– Schedule Approval</li></ul> <p>For more information see <i>Oracle Marketing Release Note for Trigger Enhancement</i>.</p> |

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## Oracle Marketing List Import Field Reference

This appendix provides tables of all of the List Import table fields used by Oracle Marketing.

Topics include:

- [Section D.1, "B2B List Import Fields"](#)
- [Section D.2, "B2C List Import Fields"](#)
- [Section D.3, "Event List Import Fields"](#)
- [Section D.4, "Lead List Import Fields"](#)

## D.1 B2B List Import Fields

The following sections describe the fields which can be used in list import. There are four sections B2B List Import, B2C List Import, Event Import and Lead Import.

**Table D–1 B2B List Import Fields**

| Field in Import File      | Data Type     | Table Name               | Import Requires Entry | Column Name               |
|---------------------------|---------------|--------------------------|-----------------------|---------------------------|
| ADDRESS LINES PHONETIC    | VARCHAR2(150) | HZ_LOCATIONS             | No                    | ADDRESS LINES PHONETIC    |
| ADDRESS1                  | VARCHAR2(150) | HZ_LOCATIONS             | No                    | ADDRESS1                  |
| ADDRESS2                  | VARCHAR2(150) | HZ_LOCATIONS             | No                    | ADDRESS2                  |
| ADDRESS3                  | VARCHAR2(150) | HZ_LOCATIONS             | No                    | ADDRESS3                  |
| ADDRESS4                  | VARCHAR2(150) | HZ_LOCATIONS             | No                    | ADDRESS4                  |
| ANALYSIS_FY               | VARCHAR2      | HZ_ORGANIZATION_PROFILES | No                    | ANALYSIS_FY               |
| CATEGORY CODE             | VARCHAR2      | HZ_PARTIES               | No                    | CATEGORY CODE             |
| CEO NAME                  | VARCHAR2(50)  | HZ_ORGANIZATION_PROFILES | No                    | CEO NAME                  |
| CITY                      | VARCHAR2(60)  | HZ_LOCATIONS             | No                    | CITY                      |
| COUNTRY                   | VARCHAR2(60)  | HZ_LOCATIONS             | No                    | COUNTRY                   |
| COUNTY                    | VARCHAR2(60)  | HZ_LOCATIONS             | No                    | -                         |
| 'COUNTRY'                 | -             | -                        | -                     | -                         |
| CREATED BY                | NUMBER        | HZ_PARTIES               | No                    | CREATED BY                |
| CREATION DATE             | DATE          | HZ_PARTIES               | No                    | CREATION DATE             |
| CURR FY POTENTIAL REVENUE | NUMBER        | HZ_ORGANIZATION_PROFILES | No                    | CURR FY POTENTIAL REVENUE |
| DECISION MAKER FLAG       | VARCHAR2(1)   | HZ_ORG_CONTACTS          | No                    | DECISION MAKER FLAG       |
| DEDUPE KEY                | VARCHAR2(150) | HZ_PARTIES               | No                    | DEDUPE KEY                |

**Table D–1 B2B List Import Fields (Cont.)**

|                           |               |                          |    |                           |
|---------------------------|---------------|--------------------------|----|---------------------------|
| DEPARTMENT                | VARCHAR2(60)  | HZ_ORG_CONTACTS          | No | DEPARTMENT                |
| DUNS NUMBER               | NUMBER        | HZ_ORGANIZATION_PROFILES | No | DUNS NUMBER               |
| EMAIL ADDRESS             | VARCHAR2(150) | HZ_CONTACT_POINTS        | No | EMAIL ADDRESS             |
| EMPLOYEES TOTAL           | NUMBER        | HZ_ORGANIZATION_PROFILES | No | EMPLOYEES TOTAL           |
| FISCAL YEAREND MONTH      | VARCHAR2(30)  | HZ_PARTIES               | No | FISCAL YEAREND MONTH      |
| FLOOR                     | VARCHAR2      | HZ_LOCATIONS             | No | FLOOR                     |
| GSA INDICATOR FLAG        | VARCHAR2      | HZ_PARTIES               | No | GSA INDICATOR FLAG        |
| HOUSE NUMBER              | VARCHAR2      | HZ_LOCATIONS             | No | HOUSE NUMBER              |
| IMPORT LIST HEADER ID     | NUMBER        | AMS_IMP_SOURCE_LINES     | No | IMPORT LIST HEADER ID     |
| IMPORT SOURCE LINE ID     | NUMBER        | AMS_IMP_SOURCE_LINES     | No | IMPORT SOURCE LINE ID     |
| JGZZ FISCAL CODE          | VARCHAR2      | HZ_PARTIES               | No | JGZZ FISCAL CODE          |
| JOB TITLE                 | VARCHAR2(60)  | HZ_ORG_CONTACTS          | No | JOB TITLE                 |
| LAST UPDATE DATE          | DATE          | AMS_IMP_SOURCE_LINES     | No | LAST UPDATE DATE          |
| LAST UPDATE LOGIN         | NUMBER        | AMS_IMP_SOURCE_LINES     | No | LAST UPDATE LOGIN         |
| LAST UPDATED BY           | NUMBER        | AMS_IMP_SOURCE_LINES     | No | LAST UPDATED BY           |
| LEGAL STATUS              | VARCHAR2(30)  | HZ_PARTIES               | No | LEGAL STATUS              |
| LINE OF BUSINESS          | VARCHAR2(30)  | HZ_PARTIES               | No | LINE OF BUSINESS          |
| MISSING STATEMENT         | VARCHAR2      | HZ_PARTIES               | No | MISSING STATEMENT         |
| NEXT FY POTENTIAL REVENUE | NUMBER        | HZ_PARTIES               | No | NEXT FY POTENTIAL REVENUE |

**Table D-1 B2B List Import Fields (Cont.)**

|                            |                |                          |     |                            |
|----------------------------|----------------|--------------------------|-----|----------------------------|
| NOTES                      | VARCHAR2(4000) | AMS_IMP_SOURCE_LINES     | No  | NOTES                      |
| ORGANIZATION NAME PHONETIC | VARCHAR2       | HZ_PARTIES               | No  | ORGANIZATION NAME PHONETIC |
| PARTY NAME                 | VARCHAR2(150)  | HZ_PARTIES               | Yes | PARTY NAME                 |
| PERSON FIRST NAME          | VARCHAR2(150)  | HZ_PARTIES               | No  | PERSON FIRST NAME          |
| PERSON LAST NAME           | VARCHAR2(150)  | HZ_PARTIES               | No  | PERSON LAST NAME           |
| PERSON MIDDLE NAME         | VARCHAR2(60)   | HZ_PARTIES               | No  | PERSON MIDDLE NAME         |
| PERSON NAME SUFFIX         | VARCHAR2(30)   | HZ_PARTIES               | No  | PERSON NAME SUFFIX         |
| PERSON TITLE               | VARCHAR2(60)   | HZ_PARTIES               | No  | PERSON TITLE               |
| PHONE AREA CODE            | VARCHAR2(10)   | HZ_CONTACT_POINTS        | No  | PHONE AREA CODE            |
| PHONE COUNTRY CODE         | VARCHAR2(10)   | HZ_CONTACT_POINTS        | No  | PHONE COUNTRY CODE         |
| PHONE EXTENTION            | VARCHAR2(20)   | HZ_CONTACT_POINTS        | No  | PHONE EXTENTION            |
| PHONE NUMBER               | VARCHAR2(40)   | HZ_CONTACT_POINTS        | No  | PHONE NUMBER               |
| PO BOX NUMBER              | -              | HZ_LOCATIONS             | No  | PO BOX NUMBER              |
| POSTAL CODE                | VARCHAR2(60)   | HZ_LOCATIONS             | No  | POSTAL CODE                |
| POSTAL PLUS4 CODE          | -              | HZ_LOCATIONS             | No  | POSTAL PLUS4 CODE          |
| PROVINCE                   | VARCHAR2(60)   | HZ_LOCATIONS             | No  | PROVINCE                   |
| SALES AGENT LOGIN ID       | VARCHAR2(2000) | AMS_IMP_SOURCE_LINES     | No  | SALES AGENT LOGIN ID       |
| SIC CODE                   | VARCHAR2       | HZ_ORGANIZATION_PROFILES | No  | SIC CODE                   |
| SIC CODE TYPE              | VARCHAR2       | HZ_ORGANIZATION_PROFILES | No  | SIC CODE TYPE              |
| SITE USE TYPE              | VARCHAR2       | HZ_ORGANIZATION_PROFILES | No  | SITE USE TYPE              |



**Table D–1 B2B List Import Fields (Cont.)**

|                             |              |                          |    |                             |
|-----------------------------|--------------|--------------------------|----|-----------------------------|
| STATE                       | VARCHAR2(60) | HZ_LOCATIONS             | No | STATE                       |
| STATE                       |              |                          |    |                             |
| STREET                      | VARCHAR2     | HZ_LOCATIONS             | No | STREET                      |
| STREET NUMBER               | VARCHAR2     | HZ_LOCATIONS             | No | STREET NUMBER               |
| STREET SUFFIX               | VARCHAR2     | HZ_LOCATIONS             | No | STREET SUFFIX               |
| SUITE                       | VARCHAR2     | HZ_LOCATIONS             | No | SUITE                       |
| TAX REFERENCE               | VARCHAR2(50) | HZ_PARTIES               | No | TAX REFERENCE               |
| VEHICLE REPOSE CODE         | VARCHAR2(30) | AMS_IMP_SOURCE_LINES     | No | VEHICLE REPOSE CODE         |
| YEAR ESTABLISHED            | NUMBER(4)    | HZ_PARTIES               | No | YEAR ESTABLISHED            |
| ADDRESS EFFECTIVE DATE      | DATE         | HZ_LOCATIONS             | -  | ADDRESS EFFECTIVE DATE      |
| ADDRESS EXPIRATION DATE     | DATE         | HZ_LOCATIONS             | -  | ADDRESS EXPIRATION DATE     |
| BRANCH FLAG                 | VARCHAR      | HZ_ORGANIZATION_PROFILES | -  | BRANCH FLAG                 |
| BUSINESS LINE               | VARCHAR      | HZ_ORGANIZATION_PROFILES | -  | BUSINESS LINE               |
| BUSINESS SCOPE              | VARCHAR      | HZ_ORGANIZATION_PROFILES | -  | BUSINESS SCOPE              |
| CHIEF EXECUTIVE TITLE       | VARCHAR      | HZ_ORGANIZATION_PROFILES | -  | CHIEF EXECUTIVE TITLE       |
| CONGRESSIONAL DISTRICT CODE | VARCHAR      | HZ_ORGANIZATION_PROFILES | -  | CONGRESSIONAL DISTRICT CODE |
| CONTROL YEAR                | NUMBER       | HZ_ORGANIZATION_PROFILES | -  | CONTROL YEAR                |
| CORPORATION CLASS           | VARCHAR      | HZ_ORGANIZATION_PROFILES | -  | CORPORATION CLASS           |

**Table D-1 B2B List Import Fields (Cont.)**

|                         |         |                          |   |                         |
|-------------------------|---------|--------------------------|---|-------------------------|
| CREDIT SCORE            | VARCHAR | HZ_ORGANIZATION_PROFILES | - | CREDIT SCORE            |
| CREDIT SCORE COMMENTARY | VARCHAR | HZ_ORGANIZATION_PROFILES | - | CREDIT SCORE COMMENTARY |
| DB RATING               | VARCHAR | HZ_ORGANIZATION_PROFILES | - | DB RATING               |
| DATE OF BIRTH           | DATE    | HZ_PERSON_PROFILES       | - | DATE OF BIRTH           |
| DATE OF DEATH           | DATE    | HZ_PERSON_PROFILES       | - | DATE OF DEATH           |
| DEBARMENTS COUNT        | NUMBER  | HZ_ORGANIZATION_PROFILES | - | DEBARMENTS COUNT        |
| DEBARTMENTS DATE        | DATE    | HZ_ORGANIZATION_PROFILES | - | DEBARTMENTS DATE        |
| DECLARED ETHNICITY      | VARCHAR | HZ_PERSON_PROFILES       | - | DECLARED ETHNICITY      |
| DEBARTMENT INDICATOR    | VARCHAR | HZ_ORGANIZATION_PROFILES | - | DEBARTMENT INDICATOR    |
| DESCRIPTION             | VARCHAR | HZ_LOCATIONS             | - | DESCRIPTION             |
| DISADVANTAGED INDICATOR | VARCHAR | HZ_ORGANIZATION_PROFILES | - | DISADVANTAGED INDICATOR |
| ENQUIRY DUNS            | VARCHAR | HZ_ORGANIZATION_PROFILES | - | ENQUIRY DUNS            |
| EXPORT INDICATOR        | VARCHAR | HZ_ORGANIZATION_PROFILES | - | EXPORT INDICATOR        |
| FAILURE SCORE           | VARCHAR | HZ_ORGANIZATION_PROFILES | - | FAILURE SCORE           |

**Table D-1 B2B List Import Fields (Cont.)**

|                               |         |                          |   |                               |
|-------------------------------|---------|--------------------------|---|-------------------------------|
| FAILURE SCORE COMMENTARY      | VARCHAR | HZ_ORGANIZATION_PROFILES | - | FAILURE SCORE COMMENTARY      |
| FAILURE SCORE NATL PERCENTILE | VARCHAR | HZ_ORGANIZATION_PROFILES | - | FAILURE SCORE NATL PERCENTILE |
| FAILURE SCORE OVERRIDE CODE   | VARCHAR | HZ_ORGANIZATION_PROFILES | - | FAILURE SCORE OVERRIDE CODE   |
| FISCAL CODE                   | VARCHAR | HZ_PARTIES               | - | FISCAL CODE                   |
| GLOBAL FAILURE SCORE          | VARCHAR | HZ_ORGANIZATION_PROFILES | - | GLOBAL FAILURE SCORE          |
| HEADQUARTER BRANCH INDICATOR  | VARCHAR | HZ_ORGANIZATION_PROFILES | - | HEADQUARTER BRANCH INDICATOR  |
| HEAD OF HOUSEHOLD FLAG        | VARCHAR | HZ_PERSON_PROFILES       | - | HEAD OF HOUSEHOLD FLAG        |
| HOUSEHOLD SIZE                | VARCHAR | HZ_PERSON_PROFILES       | - | HOUSEHOLD SIZE                |
| IMPORT INDICATOR              | VARCHAR | HZ_ORGANIZATION_PROFILES | - | IMPORT INDICATOR              |
| ORGANIZATION KNOWN AS         | VARCHAR | HZ_PARTIES               | - | ORGANIZATION KNOWN AS         |
| ORGANIZATION KNOWN AS2        | VARCHAR | HZ_PARTIES               | - | ORGANIZATION KNOWN AS2        |
| ORGANIZATION KNOWN AS3        | VARCHAR | HZ_PARTIES               | - | ORGANIZATION KNOWN AS3        |
| ORGANIZATION KNOWN AS4        | VARCHAR | HZ_PARTIES               | - | ORGANIZATION KNOWN AS4        |
| ORGANIZATION KNOWN AS5        | VARCHAR | HZ_PARTIES               | - | ORGANIZATION KNOWN AS5        |
| PERSON KNOWN AS               | VARCHAR | HZ_PARTIES               | - | PERSON KNOWN AS               |
| PERSON KNOWN AS2              | VARCHAR | HZ_PARTIES               | - | PERSON KNOWN AS2              |
| PERSON KNOWN AS3              | VARCHAR | HZ_PARTIES               | - | PERSON KNOWN AS3              |

**Table D–1 B2B List Import Fields (Cont.)**

|                               |         |                          |   |                               |
|-------------------------------|---------|--------------------------|---|-------------------------------|
| PERSON KNOWN AS4              | VARCHAR | HZ_PARTIES               | - | PERSON KNOWN AS4              |
| PERSON KNOWN AS5              | VARCHAR | HZ_PARTIES               | - | PERSON KNOWN AS5              |
| LABOR SURPLUS INDICATOR       | VARCHAR | HZ_ORGANIZATION_PROFILES | - | LABOR SURPLUS INDICATOR       |
| LOCAL ACTIVITY CODE           | VARCHAR | HZ_ORGANIZATION_PROFILES | - | LOCAL ACTIVITY CODE           |
| LOCAL ACTIVITY CODE TYPE      | VARCHAR | HZ_ORGANIZATION_PROFILES | - | LOCAL ACTIVITY CODE TYPE      |
| LOCATION DIRECTIONS           | VARCHAR | HZ_LOCATIONS             | - | LOCATION DIRECTIONS           |
| LOCATION STATUS               | VARCHAR | HZ_LOCATIONS             | - | LOCATION STATUS               |
| MARITAL STATUS                | VARCHAR | HZ_PERSON_PROFILES       | - | MARITAL STATUS                |
| MARITAL STATUS EFFECTIVE DATE | DATE    | HZ_PERSON_PROFILES       | - | MARITAL STATUS EFFECTIVE DATE |
| MINORITY OWNED INDICATOR      | VARCHAR | HZ_ORGANIZATION_PROFILES | - | MINORITY OWNED INDICATOR      |
| MINORITY OWNED TYPE           | VARCHAR | HZ_ORGANIZATION_PROFILES | - | MINORITY OWNED TYPE           |
| ORGANIZATION ALIAS            | VARCHAR | HZ_PARTIES               | - | ORGANIZATION ALIAS            |
| ORGANIZATION TYPE             | VARCHAR | HZ_PARTIES               | - | ORGANIZATION TYPE             |
| ORGANIZATION URL              | VARCHAR | HZ_PARTIES               | - | ORGANIZATION URL              |
| OUT OF BUSINESS INDICATOR     | VARCHAR | HZ_ORGANIZATION_PROFILES | - | OUT OF BUSINESS INDICATOR     |
| PERSONAL INCOME               | NUMBER  | HZ_PERSON_PROFILES       | - | PERSONAL INCOME               |
| PERSON ACADEMIC TITLE         | VARCHAR | HZ_PERSON_PROFILES       | - | PERSON ACADEMIC TITLE         |

**Table D–1 B2B List Import Fields (Cont.)**

|                               |         |                          |   |                            |
|-------------------------------|---------|--------------------------|---|----------------------------|
| PERSON FIRST NAME PHONETIC    | VARCHAR | HZ_PARTIES               | - | PERSON FIRST NAME PHONETIC |
| PERSON LAST NAME PHONETIC     | VARCHAR | HZ_PARTIES               | - | PERSON LAST NAME PHONETIC  |
| MIDDLE NAME PHONETIC          | VARCHAR | HZ_PARTIES               | - | MIDDLE NAME PHONETIC       |
| PERSON NAME PHONETIC          | VARCHAR | HZ_PARTIES               | - | PERSON NAME PHONETIC       |
| PERSON PREVIOUS TITLE NAME    | VARCHAR | HZ_PARTIES               | - | PERSON PREVIOUS TITLE NAME |
| PLACE OF BIRTH                | VARCHAR | HZ_PERSON_PROFILES       | - | PLACE OF BIRTH             |
| PRINCIPAL NAME                | VARCHAR | HZ_ORGANIZATION_PROFILES | - | PRINCIPAL NAME             |
| PRINCIPAL TITLE               | VARCHAR | HZ_ORGANIZATION_PROFILES | - | PRINCIPAL TITLE            |
| PUBLIC PRIVATE OWNERSHIP FLAG | VARCHAR | HZ_ORGANIZATION_PROFILES | - | OWNERSHIP FLAG             |
| RENT OWNED INDICATOR          | VARCHAR | HZ_PERSON_PROFILES       | - | RENT OWNED INDICATOR       |
| SECOND TITLE                  | VARCHAR | HZ_PERSON_PROFILES       | - | PERSON ACADEMIC TITLE      |
| SHORT DESCRIPTION             | VARCHAR | HZ_LOCATIONS             | - | SHORT DESCRIPTION          |
| SMALL BUSINESS INDICATOR      | VARCHAR | HZ_ORGANIZATION_PROFILES | - | SMALL BUSINESS INDICATOR   |
| TAX ID                        | VARCHAR | HZ_PERSON_PROFILES       | - | TAX REFERENCE              |
| WOMAN OWNED INDICATOR         | VARCHAR | HZ_ORGANIZATION_PROFILES | - | WOMAN OWNED INDICATOR      |
| ORGANIZATION ATTRIBUTE1       | VARCHAR | HZ_ORGANIZATION_PROFILES | - | ATTRIBUTE1                 |

**Table D-1 B2B List Import Fields (Cont.)**

|                             |         |                                  |   |             |
|-----------------------------|---------|----------------------------------|---|-------------|
| ORGANIZATION<br>ATTRIBUTE2  | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE2  |
| ORGANIZATION<br>ATTRIBUTE3  | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE3  |
| ORGANIZATION<br>ATTRIBUTE4  | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE4  |
| ORGANIZATION<br>ATTRIBUTE5  | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE5  |
| ORGANIZATION<br>ATTRIBUTE6  | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE6  |
| ORGANIZATION<br>ATTRIBUTE7  | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE7  |
| ORGANIZATION<br>ATTRIBUTE8  | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE8  |
| ORGANIZATION<br>ATTRIBUTE9  | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE9  |
| ORGANIZATION<br>ATTRIBUTE10 | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE10 |
| ORGANIZATION<br>ATTRIBUTE11 | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE11 |
| ORGANIZATION<br>ATTRIBUTE12 | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE12 |
| ORGANIZATION<br>ATTRIBUTE13 | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE13 |
| ORGANIZATION<br>ATTRIBUTE14 | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE14 |

**Table D–1 B2B List Import Fields (Cont.)**

|                             |         |                                  |   |             |
|-----------------------------|---------|----------------------------------|---|-------------|
| ORGANIZATION<br>ATTRIBUTE15 | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ATTRIBUTE15 |
| ORG CONTACT<br>ATTRIBUTE1   | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE1  |
| ORG CONTACT<br>ATTRIBUTE2   | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE2  |
| ORG CONTACT<br>ATTRIBUTE3   | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE3  |
| ORG CONTACT<br>ATTRIBUTE4   | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE4  |
| ORG CONTACT<br>ATTRIBUTE5   | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE5  |
| ORG CONTACT<br>ATTRIBUTE6   | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE6  |
| ORG CONTACT<br>ATTRIBUTE7   | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE7  |
| ORG CONTACT<br>ATTRIBUTE8   | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE8  |
| ORG CONTACT<br>ATTRIBUTE9   | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE9  |
| ORG CONTACT<br>ATTRIBUTE10  | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE10 |
| ORG CONTACT<br>ATTRIBUTE11  | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE11 |
| ORG CONTACT<br>ATTRIBUTE12  | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE12 |
| ORG CONTACT<br>ATTRIBUTE13  | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE13 |
| ORG CONTACT<br>ATTRIBUTE14  | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE14 |
| ORG CONTACT<br>ATTRIBUTE15  | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ATTRIBUTE15 |
| ADDRESS ATTRIBUTE1          | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE1  |
| ADDRESS ATTRIBUTE2          | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE2  |

**Table D-1 B2B List Import Fields (Cont.)**

|                                      |         |                                  |   |                                   |
|--------------------------------------|---------|----------------------------------|---|-----------------------------------|
| ADDRESS ATTRIBUTE3                   | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE3                        |
| ADDRESS ATTRIBUTE4                   | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE4                        |
| ADDRESS ATTRIBUTE5                   | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE5                        |
| ADDRESS<br>ATTRIBUTE6                | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE6                        |
| ADDRESS ATTRIBUTE7                   | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE7                        |
| ADDRESS ATTRIBUTE8                   | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE8                        |
| ADDRESS ATTRIBUTE9                   | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE9                        |
| ADDRESS<br>ATTRIBUTE10               | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE10                       |
| ADDRESS<br>ATTRIBUTE11               | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE11                       |
| ADDRESS<br>ATTRIBUTE12               | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE12                       |
| ADDRESS<br>ATTRIBUTE13               | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE13                       |
| ADDRESS<br>ATTRIBUTE14               | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE14                       |
| ADDRESS<br>ATTRIBUTE15               | VARCHAR | HZ_LOCATIONS                     | - | ATTRIBUTE15                       |
| FAX COUNTRY CODE                     | VARCHAR | HZ_CONTACT_<br>POINTS            | - | FAX COUNTRY CODE                  |
| FAX AREA CODE                        | VARCHAR | HZ_CONTACT_<br>POINTS            | - | FAX AREA CODE                     |
| FAX NUMBER                           | VARCHAR | HZ_CONTACT_<br>POINTS            | - | FAX NUMBER                        |
| ORG ATTRIBUTE<br>CATEGORY            | VARCHAR | HZ_<br>ORGANIZATION<br>_PROFILES | - | ORG ATTRIBUTE<br>CATEGORY         |
| ORG CONTACT<br>ATTRIBUTE<br>CATEGORY | VARCHAR | HZ_ORG_<br>CONTACTS              | - | ORG CONTACT<br>ATTRIBUTE CATEGORY |



**Table D–1 B2B List Import Fields (Cont.)**

|                            |         |                    |   |                            |
|----------------------------|---------|--------------------|---|----------------------------|
| ADDRESS ATTRIBUTE CATEGORY | VARCHAR | HZ_LOCATIONS       | - | ADDRESS ATTRIBUTE CATEGORY |
| PARTY SITE USE             | VARCHAR | HZ_PARTY_SITE_USES | - | PARTY SITE USE             |
| ORIGINAL SYSTEM REFERENCE  | VARCHAR | HZ_PARTIES         | - | ORIG SYSTEM REFERENCE      |

## D.2 B2C List Import Fields

The following table indicates B2C List Import Fields.

**Table D–2 B2C List Import Fields**

| Table Column / Field in Import File | Data Type     | Table Requires Entry | Import Requires Entry | Valid Values  | Comments                                    |
|-------------------------------------|---------------|----------------------|-----------------------|---|---|
| ADDRESS_LINES_PHONETIC              | VARCHAR2      | No                   | No                    | -   | -   |
| ADDRESS1                            | VARCHAR2(150) | No                   | No                    | -   | Required every time if address is required. |
| ADDRESS2                            | VARCHAR2(150) | No                   | No                    | -   | -   |
| ADDRESS3                            | VARCHAR2      | No                   | No                    | -   | -   |
| ADDRESS4                            | VARCHAR2      | No                   | No                    | -   | -   |
| CITY                                | VARCHAR2(60)  | No                   | No                    | Select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'CITY' | -   |

**Table D-2 B2C List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b>  | <b>Comments</b>  |
|--|------------------|-----------------------------|------------------------------|--|--|
| COUNTRY                                    | VARCHAR2(60)     | No                          | No                           | Select territory_short_name, territory_code, description from fnd_territories_vl   | Required only if any of address columns are provided in the data file. |
| COUNTY                                     | VARCHAR2(60)     | No                          | No                           | Select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'COUNTRY' | -  |
| CREATED_BY                                 | NUMBER           | Yes                         | No                           | -  | Populated by the list import program.                                  |
| CREATION_DATE                              | DATE             | Yes                         | No                           | -  | Populated by the list import program.                                  |
| DEDUPE_KEY                                 | VARCHAR2(150)    | No                          | No                           | -  | Populated by the list import program.                                  |
| EMAIL_ADDRESS                              | VARCHAR2(150)    | No                          | No                           | -  | -  |
| FLOOR                                      |                  | No                          | No                           | -  | -  |
| GENDER                                     | VARCHAR2(30)     | No                          | No                           | -  | -  |
| HOUSE_NUMBER                               |                  | No                          | No                           | -  | -  |
| HOUSEHOLD_INCOME                           | NUMBER           | No                          | No                           | -  | -  |
| IMPORT_LIST_HEADER_ID                      | NUMBER           | Yes                         | No                           | -  | Auto Generated   |
| IMPORT_SOURCE_LINE_ID                      | NUMBER           | Yes                         | No                           | -  | Auto Generated   |
| IMPORT_SUCCESSFUL_FLAG                     | VARCHAR2(1)      | No                          | No                           | -  |  |

**Table D–2 B2C List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b> | <b>Comments</b>   |
|--|------------------|-----------------------------|------------------------------|---------------------|---|
| LAST_UPDATE_DATE                           | DATE             | Yes                         | No                           | -                   | Populated by the list import program.                           |
| LAST_UPDATE_LOGIN                          | NUMBER           | Yes                         | No                           | -                   | Populated by the list import program.                           |
| LAST_UPDATED_BY                            | NUMBER           | Yes                         | No                           | -                   | Populated by the list import program.                           |
| NOTES                                      | VARCHAR2(4000)   | No                          | No                           | -                   | -   |
| OBJECT_VERSION_NUMBER                      | NUMBER           | Yes                         | No                           | -                   | Populated by the list import program.                           |
| PERSON_FIRST_NAME                          | VARCHAR2(150)    | No                          | Yes                          | -                   | This is a required column in the data file for B2C type of data |
| PERSON_LAST_NAME                           | VARCHAR2(150)    | No                          | Yes                          | -                   | This is a required column in the data file for B2C type of data |
| PERSON_MIDDLE_NAME                         | VARCHAR2(60)     | No                          | No                           | -                   | -   |
| PERSON_NAME_SUFFIX                         | VARCHAR2(30)     | No                          | No                           | -                   | -   |
| PERSON_PRE_NAME_ADJUNCT                    |                  | No                          | No                           | -                   | -   |
| PERSON_TITLE                               | VARCHAR2(60)     | No                          | No                           | -                   | -   |
| PHONE_AREA_CODE                            | VARCHAR2(10)     | No                          | No                           | -                   | -   |
| PHONE_COUNTRY_CODE                         | VARCHAR2(10)     | No                          | No                           | -                   | -   |
| PHONE_EXTENTION                            | VARCHAR2(20)     | No                          | No                           | -                   | -   |

**Table D–2 B2C List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b>  | <b>Comments</b>                                       |
|--|------------------|-----------------------------|------------------------------|--|---|
| PHONE_NUMBER                               | VARCHAR2(40)     | No                          | No                           | -  | Required if any of the phone information is provided. |
| PO_BOX_NUMBER                              | VARCHAR2         | No                          | No                           | -  | -   |
| POSTAL_CODE                                | VARCHAR2(60)     | No                          | No                           | Select min(p.from_postal_code),<br>Max(p.to_postal_code) from<br>Ar_postal_code_ranges_v p,<br>Ar_location_values a where<br>p.location_segment_id = a.location_segment_id and<br>a.location_segment_qualifier<br>= 'CITY' and<br>a.location_segment_value like 'X%' | -   |
| POSTAL_PLUS4_CODE                          |                  | No                          | No                           | -  | -   |
| PROVINCE                                   | VARCHAR2(60)     | No                          | No                           | Select distinct<br>location_segment_description,<br>location_segment_user_value from ar_location_values<br>where location_segment_qualifier =<br>'PROVINCE'  | -   |
| SALES_AGENT_LOGIN_ID                       | VARCHAR2(200)    | No                          | No                           | -  | -   |
| SALUTATION                                 | VARCHAR2         | No                          | No                           | -  | -   |
| SITE_USE_TYPE                              | VARCHAR2         | No                          | No                           | -  | -   |

**Table D–2 B2C List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b>  | <b>Comments</b>                           |
|--|------------------|-----------------------------|------------------------------|--|---|
| STATE                                      | VARCHAR2(60)     | No                          | No                           | Select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'STATE' | -   |
| STREET                                     | VARCHAR2         | No                          | No                           | -  | -   |
| STREET_NUMBER                              | VARCHAR2         | No                          | No                           | -  | -   |
| STREET_SUFFIX                              | VARCHAR2         | No                          | No                           | -  | -   |
| SUITE                                      | VARCHAR2         | No                          | No                           | -  | -   |
| VEHICLE_RESPONSE_CODE                      | VARCHAR2(30)     | No                          | No                           | -  | Based on lookup AMS_Vehicle_Response_Code |

## D.3 Event List Import Fields

Following table shows the mapping for Event registration import. Note that only Event Source code is a required field. But many other fields are conditionally required.

1. If the Party ID and Contact ID are provided in the csv file, the import will not create party but will use the ids provided in the csv and register them.
2. If the Party ID and Contact ID are not provided, then registrant first name, last name and email address are required as the import program will use those fields to create the party and register them. If the Attendant first name, last name and email address are not provided in the csv file, the import program will use the details from the registrant fields for attendant information.

**Table D–3 Event List Import Fields**

| <b>Table Column / Field in Import File</b>  | <b>Data Type</b> | <b>Valid Values</b>                  | <b>Comments</b>  | <b>Table Name</b>       | <b>Column Name</b>   |
|---|------------------|--------------------------------------|--|-------------------------|--|
| EVENT_SOURCE_CODE/ Event Source Code<br><br>Table Entry Required: Yes<br><br>Import Entry Required: Yes | VARCHAR2(100)    |                                      | Source code for Event - how the Event being registered for is identified.  | ams_Event_registrations | SOURCE_CODE  |
| REGISTRATION_SOURCE_TYPE/ Registration Source Type  | VARCHAR2(30)     | Lookup<br>AMS_EVENT_REG_SOURCE       | How the party registered for the Event (Web, phone, etc.).   | ams_Event_registrations | REG_SOURCE_TYPE_CODE   |
| ATTENDANCE_FLAG/ Attendance Flag  | VARCHAR2(1)      | Y/N                                  | Whether or not the party has attended the Event.   | ams_Event_registrations | ATTENDED_FLAG  |
| WAITLISTED_FLAG/ Waitlisted Flag  | VARCHAR2(1)      | Y/N                                  | Whether or not to force the system to waitlist the party or not waitlist the party. If null, the system will waitlist if registrations are full. | ams_Event_registrations | SYSTEM_STATUS_CODE (If the waitlisted_flag is "Y" then registration status will be Waitlisted).  |
| CANCELLATION_FLAG/ Cancellation Flag  | VARCHAR2(1)      | Y/N                                  | Whether or not to cancel the party's registration.   | ams_Event_registrations | SYSTEM_STATUS_CODE (If the cancellation flag is "Y" then registration status will be cancelled). |
| CANCELLATION_REASON_CODE/ Cancellation Reason   | VARCHAR2(30)     | Lookup<br>AMS_EVNT_REG_CANCEL_REASON | The reason for cancellation.   | ams_Event_registrations | CANCELLATION_REASON_CODE   |

**Table D–3 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b>                         | <b>Data Type</b> | <b>Valid Values</b>    | <b>Comments</b>   | <b>Table Name</b>       | <b>Column Name</b>   |
|--|------------------|------------------------|---|-------------------------|----------------------|
| CONFIRMATION_CODE/ Confirmation Code                               | VARCHAR2(30)     | -                      | This code will uniquely identify any registration.                                    | ams_Event_registrations | CONFIRMATION_CODE    |
| ORIGINAL_SYSTEM_REFERENCE/ Original System Reference               | VARCHAR2(240)    | -                      | The original system reference of the registration                                     | hz_parties              | ORG_SYSTEM_REFERENCE |
| REG_PARTY_ID/ Registrant Party ID<br>Table Entry Required: Yes     | NUMBER           | -                      | The party id corresponding to the registrant (B2C) or the registrant's company (B2B). | hz_parties              | PARTY_ID             |
| REG_PARTY_TYPE/ Registrant Party Type                              | VARCHAR2(30)     | Fnd_Lookups_Party_Type | The Party Type of the registrant's company  | hz_parties              | PARTY_TYPE           |
| REG_CONTACT_ID/ Registrant Contact ID<br>Table Entry Required: Yes | NUMBER           | -                      | The party ID corresponding to the registrant  | hz_parties              | PARTY_ID             |
| REG_PARTY_NAME/ Registrant Party Name                              | VARCHAR2(360)    | -                      | The name of the registrant's company (forces B2B).                                    | hz_parties              | PARTY_NAME           |
| REG_TITLE/ Registrant Title  | VARCHAR2(30)     | -                      | Title (Mr. Ms.) of the registrant   | hz_org_contacts         | TITLE                |
| REG_FIRST_NAME/ Registrant First Name<br>Table Entry Required: Yes | VARCHAR2(150)    | -                      | First Name of registrant  | hz_parties              | PERSON_FIRST_NAME    |
| REG_MIDDLE_NAME/ Registrant Middle Name                            | VARCHAR2(60)     | -                      | Middle name of registrant   | hz_parties              | PERSON_MIDDLE_NAME   |

**Table D–3 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b>                                 | <b>Data Type</b>   | <b>Valid Values</b> | <b>Comments</b>   | <b>Table Name</b>  | <b>Column Name</b>      |
|--|--------------------|---------------------|---|--------------------|-------------------------|
| REG_LAST_NAME/<br>Registrant Last Name<br><br>Table Entry Required:<br>Yes | VARCHAR2<br>(150)  | -                   | Last Name of registrant                                 | hz_parties         | PERSON_LAST_NAME        |
| REG_ADDRESS1/<br>Registrant Address1                                       | VARCHAR2<br>(240)F | -                   | Address (first line) of the registrant                  | hz_parties         | ADDRESS1                |
| REG_ADDRESS2/<br>Registrant Address1                                       | VARCHAR2<br>(240)F | -                   | Address (second line) of the registrant                 | hz_parties         | ADDRESS2                |
| REG_ADDRESS3/<br>Registrant Address1                                       | VARCHAR2<br>(240)F | -                   | Address (third line) of the registrant                  | hz_parties         | ADDRESS3                |
| REG_ADDRESS4/<br>Registrant Address1                                       | VARCHAR2<br>(240)F | -                   | Address (fourth line) of the registrant                 | hz_parties         | ADDRESS4                |
| REG_GENDER/<br>Registrant Gender   | VARCHAR2(30)       | -                   | Gender of the registrant                                | hz_person_profiles | GENDER                  |
| REG_ADDRESS_LINE_PHONETIC/<br>Registrant Address Line Phonetic             | VARCHAR2<br>(360)  | -                   | Phonetic address of the registrant                      | hz_locations       | ADDRESS_LINES_PHONETIC  |
| REG_ANALYSIS_FY/<br>Registrant Analysis FY                                 | VARCHAR2(5)        | -                   | FY analysis for the registrant                          | hz_parties         | ANALYSIS_FY             |
| REG_APT_FLAG/<br>Registrant Apt Flag                                       | VARCHAR2(1)        | -                   | Whether or not the registrant's address is an apartment | hz_locations       | APARTMENT_FLAG          |
| REG_BEST_TIME_CONTACT_BEGIN/<br>Registrant Best Time Contact Begin         | DATE               | -                   | Best time to begin contacting the registrant            | hz_person_profiles | BEST_TIME_CONTACT_BEGIN |
| REG_BEST_TIME_CONTACT_END<br>Registrant Best Time Contact End              | DATE               | -                   | Best time to stop contacting the registrant             | hz_person_profiles | BEST_TIME_CONTACT_END   |



**Table D-3 Event List Import Fields (Cont.)**

| Table Column / Field in Import File                                   | Data Type     | Valid Values | Comments   | Table Name                 | Column Name                              |
|---|---------------|--------------|--|----------------------------|--|
| REG_CATEGORY_CODE/ Registrant Category Code                           | VARCHAR2(30)  | -            | Category code of the registrant  | hz_parties                 | CATEGORY_CODE                            |
| REG_CEO_NAME/ Registrant CEO Name                                     | VARCHAR2(360) | -            | CEO of the registrant's company  | hz_organizational_profiles | CEO_NAME                                 |
| REG_CITY/ Registrant City   | VARCHAR2(60)  | -            | City of the Registrant's Address   | hz_parties                 | CITY                                     |
| REG_CONTACT_ME_FLAG/ Registrant Contact Me Flag                       | VARCHAR2(1)   | Y/N          | Whether or not it is OK to contact the registrant (Do or Do Not Contact) | hz_contact_preferences     | PREFERENCE_CODE (if Contact Type is ALL) |
| REG_COUNTRY/ Registrant Country                                       | VARCHAR2(60)  | -            | Country of the registrant's address                                      | hz_parties                 | COUNTRY                                  |
| REG_COUNTY/ Registrant County   | VARCHAR2(60)  | -            | County of the registrant's address                                       | hz_parties                 | COUNTY                                   |
| REG_CURRENT_FY_POTENTIAL_REV/ Registrant Current FY Potential Revenue | NUMBER        | -            | Current fiscal year potential revenue of the registrant's company        | hz_parties                 | CURR_FY_POTENTIAL_REVENUE                |
| REG_NEXT_FY_POTENTIAL_REV/ Registrant Next FY Potential Revenue       | NUMBER        | -            | Next fiscal year potential revenue of the registrant's company           | hz_parties                 | NEXT_FY_POTENTIAL_REVENUE                |
| REG_HOUSEHOLD_INCOME/ Registrant Household Income                     | NUMBER        | -            | Household income of the registrant                                       | hz_person_profiles         | HOUSEHOLD_INCOME                         |
| REG_DECISION_MAKER_FLAG/ Registrant Decision Maker Flag               | VARCHAR2(1)   | Y/N          | Whether or not the registrant is a decision maker                        | hz_org_contacts            | DECISION_MAKER_FLAG                      |

**Table D–3 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b>  | <b>Data Type</b>   | <b>Valid Values</b> | <b>Comments</b>  | <b>Table Name</b>              | <b>Column Name</b>                                 |
|---|--------------------|---------------------|--|--------------------------------|--|
| REG_<br>DEPARTMENT/<br>Registrant<br>Department   | VARCHAR2<br>(360)  | -                   | The registrant's<br>company<br>department                                  | hz_org_<br>contacts            | DEPARTMENT   |
| REG_DUN_NO_C/<br>Registrant Dun No.   | VARCHAR2(30<br>)   | -                   | The Duns Number<br>of the registrant's<br>company                          | hz_parties                     | DUNS_NUMBER  |
| REG_EMAIL_<br>ADDRESS/<br>Registrant email<br>address<br><br>Table Entry Required:<br>Yes | VARCHAR2<br>(2000) | -                   | Email address of<br>the registrant   | hz_parties                     | EMAIL_ADDRESS                                      |
| REG_EMAIL_OK_<br>FLAG/ Registrant<br>Email OK Flag  | VARCHAR2(1)        | Y/N                 | Whether or not it<br>is OK to email the<br>registrant                      | hz_<br>contact_<br>preferences | PREFERENCE_<br>CODE (if Contact_<br>Type is EMAIL) |
| REG_EMPLOYEE_<br>TOTAL/ Registrant<br>Employee Total                                      | NUMBER             | -                   | Employee total of<br>the registrant's<br>company                           | hz_parties                     | EMPLOYEES_<br>TOTAL                                |
| REG_FY_END_<br>MONTH/ Registrant<br>FY End Month  | VARCHAR2(30<br>)   | -                   | The month in<br>which the<br>registrant's<br>company's fiscal<br>year ends | hz_parties                     | FISCAL_<br>YEAREND_<br>MONTH                       |
| REG_FLOOR/<br>Registrant's Floor  | VARCHAR2(50<br>)   | -                   | The floor (address)<br>of the registrant                                   | hz_<br>locations               | FLOOR  |
| REG_GSA_<br>INDICATOR_FLAG/<br>Registrant GSA<br>Indicator Flag                           | VARCHAR2(30<br>)   | -                   | The GSA Indicator<br>Flag of the<br>registrant's<br>company                | hz_parties                     | GSA_<br>INDICATOR_<br>FLAG                         |
| REG_HOUSE_<br>NUMBER/<br>Registrant House<br>Number                                       | NUMBER             | -                   | The house number<br>of the registrant's<br>address                         | hz_<br>locations               | HOUSE_<br>NUMBER                                   |
| REG_IDENTIFYING_<br>ADDRESS_FLAG/<br>Registrant Identifying<br>Address Flag               | VARCHAR2(1)        | Y/N                 | Whether or not<br>this is the<br>registrant's<br>primary address           | hz_party_<br>sites             | IDENTIFYING_<br>ADDRESS_FLAG                       |

**Table D–3 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b>                  | <b>Data Type</b> | <b>Valid Values</b> | <b>Comments</b>  | <b>Table Name</b>          | <b>Column Name</b>         |
|---|------------------|---------------------|--|----------------------------|----------------------------|
| REG_JGZZ_FISCAL_CODE/ Registrant JGZZ FISCAL Code           | VARCHAR2(20)     | -                   | The JGZZ Fiscal Code of the registrant's company             | hz_parties                 | JGZZ_FISCAL_CODE           |
| REG_JOB_TITLE/ Registrant Job Title                         | VARCHAR2(100)    | -                   | The job title of the registrant                              | hz_org_contacts            | JOB_TITLE                  |
| REG_LAST_ORDER_DATE/ Registrant Last Order Date             | DATE             | -                   | Deprecated   | hz_parties                 | LAST_ORDERED_DATE          |
| REG_ORG_LEGAL_STATUS/ Registrant Org Legal Status           | VARCHAR2(30)     | -                   | The legal status of the registrant's company                 | hz_organizational_profiles | LEGAL_STATUS               |
| REG_LINE_OF_BUSINESS/ Registrant Line of Business           | VARCHAR2(240)    | -                   | The line of business with which the registrant is associated | hz_organizational_profiles | LINE_OF_BUSINESS           |
| REG_MISSION_STATEMENT/ Registrant Mission Statement         | VARCHAR2(2000)   | -                   | The mission statement for the registrant's company           | hz_parties                 | MISSION_STATEMENT          |
| REG_ORG_NAME_PHONETIC/ Registrant Org Name Phonetic         | VARCHAR2(320)    | -                   | The phonetic name of the registrant's company                | hz_parties                 | ORGANIZATION_NAME_PHONETIC |
| REG_OVERSEAS_ADDRESS_FLAG/ Registrant Overseas Address Flag | VARCHAR2(1)      | Y/N                 | Whether or not the address is overseas                       | hz_locations               | OVERSEAS_ADDRESS_FLAG      |
| REG_NAME_SUFFIX/ Registrant Name Suffix                     | VARCHAR2(30)     | -                   | The suffix of the registrant (Jr., M.D., etc.)               | hz_parties                 | PERSON_NAME_SUFFIX         |
| REG_PHONE_AREA_CODE/ Registrant Phone Area Code             | VARCHAR2(10)     | -                   | The area code of the registrant's phone number               | hz_contact_points          | PHONE_AREA_CODE            |

**Table D–3 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b>                           | <b>Data Type</b> | <b>Valid Values</b> | <b>Comments</b>  | <b>Table Name</b>           | <b>Column Name</b>       |
|--|------------------|---------------------|--|-----------------------------|--------------------------|
| REG_PHONE_COUNTRY_CODE/<br>Registrant Phone Country Code             | VARCHAR2(10)     | -                   | The country code of the registrant's phone number            | hz_contact_points           | PHONE_COUNTRY_CODE       |
| REG_PHONE_EXTENSION/<br>Registrant Phone Extension                   | VARCHAR2(20)     | -                   | The extension of the registrant's phone number               | hz_contact_points           | PHONE_EXTENSION          |
| REG_PHONE_NUMBER/<br>Registrant Phone Number                         | VARCHAR2(40)     | -                   | The registrant's phone number                                | hz_contact_points           | PHONE_NUMBER             |
| REG_POSTAL_CODE/<br>Registrant Postal Code                           | VARCHAR2(60)     | -                   | The postal code of the registrant's address                  | hz_parties                  | POSTAL_CODE              |
| REG_POSTAL_PLUS4_CODE/<br>Registrant Postal plus4 Code               | VARCHAR2(4)      | -                   | The postal plus-four code of the registrant's address        | hz_locations                | POSTAL_PLUS4_CODE        |
| REG_PO_BOX_NO/<br>Registrant PO Box No                               | VARCHAR2(50)     | -                   | The PO Box number of the registrant's address                | hz_locations                | PO_BOX_NUMBER            |
| REG_PROVINCE/<br>Registrant Province                                 | VARCHAR2(60)     | -                   | The province of the registrant's address                     | hz_locations,<br>hz_parties | PROVINCE                 |
| REG_RURAL_ROUTE_NO/<br>Registrant Rural Route No                     | VARCHAR2(50)     | -                   | The rural route number of the registrant's address           | hz_locations                | RURAL_ROUTE_NUMBER       |
| REG_RURAL_ROUTE_TYPE/<br>Registrant Rural Route Type                 | VARCHAR2(30)     | -                   | The rural route type of the registrant's address             | hz_locations                | RURTAL_ROUTE_TYPE        |
| REG_SECONDARY_SUFFIX_ELEMENT/<br>Registrant Secondary Suffix Element | VARCHAR2(30)     | -                   | The secondary suffix (such as Jr. or M.D.) of the registrant | hz_locations                | SECONDARY_SUFFIX_ELEMENT |

**Table D–3 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b>         | <b>Data Type</b>  | <b>Valid Values</b> | <b>Comments</b>                               | <b>Table Name</b>           | <b>Column Name</b> |
|--|-------------------|---------------------|---|-----------------------------|--------------------|
| REG_SIC_CODE/<br>Registrant SIC Code               | VARCHAR2(30)<br>) | -                   | The SIC Code of the registrant's company      | hz_parties                  | SIC_CODE           |
| REG_SIC_CODE_<br>TYPE/ Registrant SIC Code Type    | VARCHAR2(30)<br>) | -                   | The SIC Code Type of the registrant's company | hz_parties                  | SIC_CODE_TYPE      |
| REG_SITE_USE_<br>CODE/ Registrant Site Use Code    | VARCHAR2(30)<br>) | -                   | The site use code of the registrant's address | Not Used                    | Not Used           |
| REG_STATE/<br>Registrant State                     | VARCHAR2(60)<br>) | -                   | The state of the registrant's address         | hz_locations,<br>hz_parties | STATE              |
| REG_STREET/<br>Registrant Street                   | VARCHAR2(50)<br>) | -                   | The street of the registrant's address        | hz_locations                | STREET             |
| REG_STREET_<br>NUMBER/<br>Registrant Street Number | VARCHAR2(50)<br>) | -                   | The street number of the registrant's address | hz_locations                | STREET_NUMBER      |
| REG_STREET_<br>SUFFIX/ Registrant Street Suffix    | VARCHAR2(50)<br>) | -                   | The street suffix of the registrant's address | hz_locations                | STREET_SUFFIX      |
| REG_SUITE/<br>Registrant Suite                     | VARCHAR2(50)<br>) | -                   | The suite of the registrant's address         | hz_locations                | SUITE              |
| REG_TAX_NAME/<br>Registrant Tax Name               | VARCHAR2(30)<br>) | -                   | The tax name of the registrant's company      | hz_parties                  | TAX_NAME           |
| REG_TAX_<br>REFERENCE/<br>Registrant Tax Reference | VARCHAR2(50)<br>) | -                   | The tax reference of the registrant's company | hz_parties                  | TAX_REFERENCE      |
| REG_TIME_ZONE/<br>Registrant Time Zone             | NUMBER            | -                   | The timezone of the registrant's address      | hz_locations                | TIME_ZONE          |

**Table D–3 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b>                           | <b>Data Type</b> | <b>Valid Values</b> | <b>Comments</b>   | <b>Table Name</b>             | <b>Column Name</b>   |
|--|------------------|---------------------|---|-------------------------------|----------------------|
| REG_TOTAL_NO_OF_ORDER/<br>Registrant Total Number of Orders          | NUMBER           | -                   | Deprecated  | hz_parties                    | TOTAL_NUM_OF_ORDERS  |
| REG_TOTAL_ORDER_AMOUNT/<br>Registrant Total Order Amount             | NUMBER           | -                   | Deprecated  | hz_parties                    | TOTAL_ORDERED_AMOUNT |
| REG_YEAR_ESTABLISHED/<br>Registrant Year Established                 | NUMBER           | -                   | The year the registrant's company was established                                   | hz_parties                    | YEAR_ESTABLISHED     |
| REG_URL/<br>Registrant URL   | VARCHAR2(2000)   | -                   | The URL of the registrant's company   | hz_contact_points, hz_parties | URL                  |
| ATT_PARTY_ID/<br>attendant Party ID<br>Table Entry Required: Yes     | NUMBER           | -                   | The party id corresponding to the attendant (B2C) or the attendant's company (B2B). | hz_parties                    | PARTY_ID             |
| ATT_PARTY_TYPE/<br>Attendant Party Type                              | VARCHAR2(30)     | -                   | The Party Type of the attendant's company   | hz_parties                    | PARTY_TYPE           |
| ATT_CONTACT_ID/<br>Attendant Contact ID<br>Table Entry Required: Yes | NUMBER           | -                   | The party ID corresponding to the attendant   | hz_parties                    | PARTY_ID             |
| ATT_PARTY_NAME/<br>Attendant Party Name                              | VARCHAR2(360)    | -                   | The name of the attendant's company (forces B2B).                                   | hz_parties                    | PARTY_NAME           |
| ATT_TITLE/<br>Attendant Title  | VARCHAR2(30)     | -                   | Title (Mr. Ms.) of the attendant  | hz_org_contacts               | TITLE                |

**Table D–3 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b>                                  | <b>Data Type</b>   | <b>Valid Values</b> | <b>Comments</b>   | <b>Table Name</b>      | <b>Column Name</b>             |
|---|--------------------|---------------------|---|------------------------|--------------------------------|
| ATT_FIRST_NAME/<br>Attendant First Name<br><br>Table Entry Required:<br>Yes | VARCHAR2<br>(150)  | -                   | First Name of<br>attendant                                      | hz_parties             | PERSON_FIRST_<br>NAME          |
| ATT_MIDDLE_<br>NAME/ Attendant<br>Middle Name                               | VARCHAR2(60<br>)   | -                   | Middle name of<br>attendant                                     | hz_parties             | PERSON_<br>MIDDLE NAME         |
| ATT_LAST_NAME/<br>Attendant Last Name<br><br>Table Entry Required:<br>Yes   | VARCHAR2<br>(150)  | -                   | Last Name of<br>attendant                                       | hz_parties             | PERSON_LAST_<br>NAME           |
| ATT_ADDRESS1/<br>Attendant Address1   | VARCHAR2<br>(240)F | -                   | Address (first line)<br>of the attendant                        | hz_parties             | ADDRESS1                       |
| ATT_ADDRESS2/<br>Attendant Address1   | VARCHAR2<br>(240)F | -                   | Address (second<br>line) of the<br>attendant                    | hz_parties             | ADDRESS2                       |
| ATT_ADDRESS3/<br>Attendant Address1   | VARCHAR2<br>(240)F | -                   | Address (third<br>line) of the<br>attendant                     | hz_parties             | ADDRESS3                       |
| ATT_ADDRESS4/<br>Attendant Address1   | VARCHAR2<br>(240)F | -                   | Address (fourth<br>line) of the<br>attendant                    | hz_parties             | ADDRESS4                       |
| ATT_GENDER/<br>Attendant Gender   | VARCHAR2(30<br>)   | -                   | Gender of the<br>attendant                                      | hz_person_<br>profiles | GENDER                         |
| ATT_ADDRESS_<br>LINE_PHONETIC/<br>Attendant Address<br>Line Phonetic        | VARCHAR2<br>(360)  | -                   | Phonetic address<br>of the attendant                            | hz_<br>locations       | ADDRESS_<br>LINES_<br>PHONETIC |
| ATT_ANALYSIS_<br>FY/ Attendant<br>Analysis FY                               | VARCHAR2(5)        | -                   | FY analysis for the<br>attendant                                | hz_parties             | ANALYSIS_FY                    |
| ATT_APT_FLAG/<br>Attendant Apt Flag   | VARCHAR2(1)        | Y/N                 | Whether or not the<br>attendant's<br>address is an<br>apartment | hz_<br>locations       | APARTMENT_<br>FLAG             |

**Table D-3 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b>                              | <b>Data Type</b> | <b>Valid Values</b> | <b>Comments</b>   | <b>Table Name</b>          | <b>Column Name</b>                       |
|---|------------------|---------------------|---|----------------------------|--|
| ATT_BEST_TIME_CONTACT_BEGIN/<br>Attendant Best Time Contact Begin       | DATE             | -                   | Best time to begin contacting the attendant                             | hz_person_profiles         | BEST_TIME_CONTACT_BEGIN                  |
| ATT_BEST_TIME_CONTACT_END<br>Attendant Best Time Contact End            | DATE             | -                   | Best time to stop contacting the attendant                              | hz_person_profiles         | BEST_TIME_CONTACT_END                    |
| ATT_CATEGORY_CODE/<br>Attendant Category Code                           | VARCHAR2(30)     | -                   | Category code of the attendant  | hz_parties                 | CATEGORY_CODE                            |
| ATT_CEO_NAME/<br>Attendant CEO Name                                     | VARCHAR2(360)    | -                   | CEO of the attendant's company  | hz_organizational_profiles | CEO_NAME                                 |
| ATT_CITY/<br>Attendant City   | VARCHAR2(60)     | -                   | City of the attendant's Address   | hz_parties                 | CITY                                     |
| ATT_CONTACT_ME_FLAG/<br>Attendant Contact Me Flag                       | VARCHAR2(1)      | Y/N                 | Whether or not it is OK to contact the attendant (Do or Do Not Contact) | hz_contact_preferences     | PREFERENCE_CODE (if Contact Type is ALL) |
| ATT_COUNTRY/<br>Attendant Country                                       | VARCHAR2(60)     | -                   | Country of the attendant's address                                      | hz_parties                 | COUNTRY                                  |
| ATT_COUNTY/<br>Attendant County   | VARCHAR2(60)     | -                   | County of the attendant's address                                       | hz_parties                 | COUNTY                                   |
| ATT_CURRENT_FY_POTENTIAL_REV/<br>Attendant Current FY Potential Revenue | NUMBER           | -                   | Current fiscal year potential revenue of the attendant's company        | hz_parties                 | CURR_FY_POTENTIAL_REVENUE                |
| ATT_NEXT_FY_POTENTIAL_REV/<br>Attendant Next FY Potential Revenue       | NUMBER           | -                   | Next fiscal year potential revenue of the attendant's company           | hz_parties                 | NEXT_FY_POTENTIAL_REVENUE                |



**Table D–3 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b>                              | <b>Data Type</b> | <b>Valid Values</b> | <b>Comments</b>   | <b>Table Name</b>      | <b>Column Name</b>                         |
|---|------------------|---------------------|---|------------------------|--|
| ATT_HOUSEHOLD_INCOME/ Attendant Household Income                        | NUMBER           |                     | Household income of the attendant                             | hz_person_profiles     | HOUSEHOLD_INCOME                           |
| ATT_DECISION_MAKER_FLAG/ Attendant Decision Maker Flag                  | VARCHAR2(1)      | Y/N                 | Whether or not the attendant is a decision maker              | hz_org_contacts        | DECISION_MAKER_FLAG                        |
| ATT_DEPARTMENT/ Attendant Department                                    | VARCHAR2(360)    | -                   | The attendant's company department                            | hz_org_contacts        | DEPARTMENT                                 |
| ATT_DUN_NO_C/ Attendant Dun No.   | VARCHAR2(30)     | -                   | The Duns Number of the attendant's company                    | hz_parties             | DUNS_NUMBER                                |
| ATT_EMAIL_ADDRESS/ Attendant email address<br>Table Entry Required: Yes | VARCHAR2(2000)   | -                   | Email address of the attendant                                | hz_parties             | EMAIL_ADDRESS                              |
| ATT_EMAIL_OK_FLAG/ Attendant Email OK Flag                              | VARCHAR2(1)      | Y/N                 | Whether or not it is OK to email the attendant                | hz_contact_preferences | PREFERENCE_CODE (if Contact Type is EMAIL) |
| ATT_EMPLOYEE_TOTAL/ Attendant Employee Total                            | NUMBER           | -                   | Employee total of the attendant's company                     | hz_parties             | EMPLOYEES_TOTAL                            |
| ATT_FY_END_MONTH/ Attendant FY End Month                                | VARCHAR2(30)     | -                   | The month in which the attendant's company's fiscal year ends | hz_parties             | FISCAL_YEAREND_MONTH                       |
| ATT_FLOOR/ Attendant's Floor  | VARCHAR2(50)     | -                   | The floor (address) of the attendant                          | hz_locations           | FLOOR                                      |
| ATT_GSA_INDICATOR_FLAG/ Attendant GSA Indicator Flag                    | VARCHAR2(30)     | -                   | The GSA Indicator Flag of the attendant's company             | hz_parties             | GSA_INDICATOR_FLAG                         |

**Table D–3 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b>                          | <b>Data Type</b> | <b>Valid Values</b> | <b>Comments</b>   | <b>Table Name</b>          | <b>Column Name</b>         |
|---|------------------|---------------------|---|----------------------------|----------------------------|
| ATT_HOUSE_NUMBER/<br>Attendant House Number                         | NUMBER           | -                   | The house number of the attendant's address                 | hz_locations               | HOUSE_NUMBER               |
| ATT_IDENTIFYING_ADDRESS_FLAG/<br>Attendant Identifying Address Flag | VARCHAR2(1)      | Y/N                 | Whether or not this is the attendant's primary address      | hz_party_sites             | IDENTIFYING_ADDRESS_FLAG   |
| ATT_JGZZ_FISCAL_CODE/<br>Attendant JGZZ FISCAL Code                 | VARCHAR2(20)     | -                   | The JGZZ Fiscal Code of the attendant's company             | hz_parties                 | JGZZ_FISCAL_CODE           |
| ATT_JOB_TITLE/<br>Attendant Job Title                               | VARCHAR2(100)    | -                   | The job title of the attendant                              | hz_org_contacts            | JOB_TITLE                  |
| ATT_LAST_ORDER_DATE/<br>Attendant Last Order Date                   | DATE             | -                   | Deprecated  | hz_parties                 | LAST_ORDERED_DATE          |
| ATT_ORG_LEGAL_STATUS/<br>Attendant Org Legal Status                 | VARCHAR2(30)     | -                   | The legal status of the attendant's company                 | hz_organizational_profiles | LEGAL_STATUS               |
| ATT_LINE_OF_BUSINESS/<br>Attendant Line of Business                 | VARCHAR2(240)    | -                   | The line of business with which the attendant is associated | hz_organizational_profiles | LINE_OF_BUSINESS           |
| ATT_MISSION_STATEMENT/<br>Attendant Mission Statement               | VARCHAR2(2000)   | -                   | The mission statement for the attendant's company           | hz_parties                 | MISSION_STATEMENT          |
| ATT_ORG_NAME_PHONETIC/<br>Attendant Org Name Phonetic               | VARCHAR2(320)    | -                   | The phonetic name of the attendant's company                | hz_parties                 | ORGANIZATION_NAME_PHONETIC |
| ATT_OVERSEAS_ADDRESS_FLAG/<br>Attendant Overseas Address Flag       | VARCHAR2(1)      | Y/N                 | Whether or not the address is overseas                      | hz_locations               | OVERSEAS_ADDRESS_FLAG      |

**Table D–3 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b>              | <b>Data Type</b>  | <b>Valid Values</b> | <b>Comments</b>                                      | <b>Table Name</b>           | <b>Column Name</b> |
|---|-------------------|---------------------|--|-----------------------------|--------------------|
| ATT_NAME_SUFFIX/<br>Attendant Name Suffix               | VARCHAR2(30)<br>) | -                   | The suffix of the attendant (Jr., M.D., etc.)        | hz_parties                  | PERSON_NAME_SUFFIX |
| ATT_PHONE_AREA_CODE/<br>Attendant Phone Area Code       | VARCHAR2(10)<br>) | -                   | The area code of the attendant's phone number        | hz_contact_points           | PHONE_AREA_CODE    |
| ATT_PHONE_COUNTRY_CODE/<br>Attendant Phone Country Code | VARCHAR2(10)<br>) | -                   | The country code of the attendant's phone number     | hz_contact_points           | PHONE_COUNTRY_CODE |
| ATT_PHONE_EXTENSION/<br>Attendant Phone Extension       | VARCHAR2(20)<br>) | -                   | The extension of the attendant's phone number        | hz_contact_points           | PHONE_EXTENSION    |
| ATT_PHONE_NUMBER/<br>Attendant Phone Number             | VARCHAR2(40)<br>) | -                   | The attendant's phone number                         | hz_contact_points           | PHONE_NUMBER       |
| ATT_POSTAL_CODE/<br>Attendant Postal Code               | VARCHAR2(60)<br>) | -                   | The postal code of the attendant's address           | hz_parties                  | POSTAL_CODE        |
| ATT_POSTAL_PLUS4_CODE/<br>Attendant Postal plus4 Code   | VARCHAR2(4)<br>)  | -                   | The postal plus-four code of the attendant's address | hz_locations                | POSTAL_PLUS4_CODE  |
| ATT_PO_BOX_NO/<br>Attendant PO Box No                   | VARCHAR2(50)<br>) | -                   | The PO Box number of the attendant's address         | hz_locations                | PO_BOX_NUMBER      |
| ATT_PROVINCE/<br>Attendant Province                     | VARCHAR2(60)<br>) | -                   | The province of the attendant's address              | hz_locations,<br>hz_parties | PROVINCE           |
| ATT_RURAL_ROUTE_NO/<br>Attendant Rural Route Number     | VARCHAR2(50)<br>) | -                   | The rural route number of the attendant's address    | hz_locations                | RURAL_ROUTE_NUMBER |

**Table D–3 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b>                          | <b>Data Type</b> | <b>Valid Values</b> | <b>Comments</b>   | <b>Table Name</b>           | <b>Column Name</b>       |
|---|------------------|---------------------|---|-----------------------------|--------------------------|
| ATT_RURAL_ROUTE_TYPE/<br>Attendant Rural Route Type                 | VARCHAR2(30)     | -                   | The rural route type of the attendant's address             | hz_locations                | RURTAL_ROUTE_TYPE        |
| ATT_SECONDARY_SUFFIX_ELEMENT/<br>Attendant Secondary Suffix Element | VARCHAR2(30)     | -                   | The secondary suffix (such as Jr. or M.D.) of the attendant | hz_locations                | SECONDARY_SUFFIX_ELEMENT |
| ATT_SIC_CODE/<br>Attendant SIC Code                                 | VARCHAR2(30)     | -                   | The SIC Code of the attendant's company                     | hz_parties                  | SIC_CODE                 |
| ATT_SIC_CODE_TYPE/<br>Attendant SIC Code Type                       | VARCHAR2(30)     | -                   | The SIC Code Type of the attendant's company                | hz_parties                  | SIC_CODE_TYPE            |
| ATT_SITE_USE_CODE/<br>Attendant Site Use Code                       | VARCHAR2(30)     | -                   | The site use code of the attendant's address                | Not Used                    | Not Used                 |
| ATT_STATE/<br>Attendant State                                       | VARCHAR2(60)     | -                   | The state of the attendant's address                        | hz_locations,<br>hz_parties | STATE                    |
| ATT_STREET/<br>Attendant Street                                     | VARCHAR2(50)     | -                   | The street of the attendant's address                       | hz_locations                | STREET                   |
| ATT_STREET_NUMBER/<br>Attendant Street Number                       | VARCHAR2(50)     | -                   | The street number of the attendant's address                | hz_locations                | STREET_NUMBER            |
| ATT_STREET_SUFFIX/<br>Attendant Street Suffix                       | VARCHAR2(50)     | -                   | The street suffix of the attendant's address                | hz_locations                | STREET_SUFFIX            |
| ATT_SUITE/<br>Attendant Suite                                       | VARCHAR2(50)     | -                   | The suite of the attendant's address                        | hz_locations                | SUITE                    |
| ATT_TAX_NAME/<br>Attendant Tax Name                                 | VARCHAR2(30)     | -                   | The tax name of the attendant's company                     | hz_parties                  | TAX_NAME                 |

**Table D–3 Event List Import Fields (Cont.)**

| Table Column / Field in Import File                        | Data Type      | Valid Values | Comments   | Table Name                    | Column Name          |
|--|----------------|--------------|--|-------------------------------|----------------------|
| ATT_TAX_REFERENCE/<br>Attendant Tax Reference              | VARCHAR2(50)   | -            | The tax reference of the attendant's company     | hz_parties                    | TAX_REFERENCE        |
| ATT_TIME_ZONE/<br>Attendant Time Zone                      | NUMBER         | -            | The timezone of the attendant's address          | hz_locations                  | TIME_ZONE            |
| ATT_TOTAL_NO_OF_ORDER/<br>Attendant Total Number of Orders | NUMBER         | -            | Deprecated                                       | hz_parties                    | TOTAL_NUM_OF_ORDERS  |
| ATT_TOTAL_ORDER_AMOUNT/<br>Attendant Total Order Amount    | NUMBER         | -            | Deprecated                                       | hz_parties                    | TOTAL_ORDERED_AMOUNT |
| ATT_YEAR_ESTABLISHED/<br>Attendant Year Established        | NUMBER         | -            | The year the attendant's company was established | hz_parties                    | YEAR_ESTABLISHED     |
| ATT_URL/<br>Attendant URL                                  | VARCHAR2(2000) | -            | The URL of the attendant's company               | hz_contact_points, hz_parties | URL                  |

## D.4 Lead List Import Fields

The following field is new:

- PERSON\_INITIALS

Obsolete columns:

- CUSTOMER\_KEY
- ADDRESS\_KEY
- CONTACT\_KEY

**Table D–4 Event List Import Fields**

| <b>Table Column / Field<br/>in Import File</b> | <b>Data Type</b> | <b>Table<br/>Requires<br/>Entry</b> | <b>Import<br/>Requires<br/>Entry</b> | <b>Valid Values</b>                                     | <b>Comments</b>                     |
|--|------------------|-------------------------------------|--------------------------------------|---|-------------------------------------|
| ACCEPT_FLAG                                    | -                | -                                   | -                                    | -   | -                                   |
| ACTIVE_FLAG                                    | VARCHAR2(1)      | -                                   | -                                    | -   | -                                   |
| ADDRESS_<br>EFFECTIVE_DATE                     | VARCHAR2         | -                                   | -                                    | -   | -                                   |
| ADDRESS_KEY                                    | VARCHAR2         | -                                   | -                                    | -   | Stores the Address Key<br>generated |
| ADDRESS_LINES_<br>PHONETIC                     | VARCHAR2         | -                                   | -                                    | -   | -                                   |
| ADDRESS_STYLE                                  | VARCHAR2         | -                                   | -                                    | -   | -                                   |
| ADDRESSEE                                      | VARCHAR2         | -                                   | -                                    | -   | -                                   |
| ASSIGN_DATE                                    | VARCHAR2         | -                                   | -                                    | -   | -                                   |
| ASSIGN_SALES_<br>GROUP_ID                      | VARCHAR2         | -                                   | -                                    | -   | -                                   |
| ASSIGN_TO_PERSON_<br>ID                        | VARCHAR2         | -                                   | -                                    | -   | -                                   |
| ASSIGN_TO_<br>SALESFORCE_ID                    | VARCHAR2         | -                                   | -                                    | -   | -                                   |
| ATTENDANCE_<br>FAILURE_REASON                  | VARCHAR2(30<br>) | -                                   | -                                    | AMS_EVENT_<br>ATTENDANC<br>E_FAILURE_<br>CODE<br>LOOKUP | -                                   |
| ATTENDANCE_<br>RESULT_CODE                     | VARCHAR2(30<br>) | -                                   | -                                    | -   | -                                   |
| ATTENDANT_<br>ACCOUNT_ID                       | NUMBER           | -                                   | -                                    | CUSTOMER_<br>ACCOUNT_ID                                 | -                                   |
| ATTENDANT_<br>CONTACT_ID                       | NUMBER           |                                     | Yes                                  | CONTACT_ID  | -                                   |
| ATTENDANT_<br>LANGUAGE                         | VARCHAR2(30<br>) | -                                   | -                                    | -   | -                                   |
| ATTENDANT_<br>PARTY_ID                         | NUMBER           | -                                   | -                                    | PARTY_ID  | -                                   |

**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field<br/>in Import File</b> | <b>Data Type</b>  | <b>Table<br/>Requires<br/>Entry</b> | <b>Import<br/>Requires<br/>Entry</b> | <b>Valid Values</b> | <b>Comments</b> |
|--|-------------------|-------------------------------------|--------------------------------------|---------------------|-----------------|
| ATTENDED_FLAG                                  | VARCHAR2(1)       | -                                   | -                                    | -                   | -               |
| ATTRIBUTE_<br>CATEGORY                         | VARCHAR2(30<br>)  | -                                   | -                                    | -                   | -               |
| ATTRIBUTE1                                     | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |
| ATTRIBUTE10                                    | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |
| ATTRIBUTE11                                    | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |
| ATTRIBUTE12                                    | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |
| ATTRIBUTE13                                    | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |
| ATTRIBUTE14                                    | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |
| ATTRIBUTE15                                    | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |
| ATTRIBUTE2                                     | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |
| ATTRIBUTE3                                     | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |
| ATTRIBUTE4                                     | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |
| ATTRIBUTE5                                     | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |
| ATTRIBUTE6                                     | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |
| ATTRIBUTE7                                     | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |
| ATTRIBUTE8                                     | VARCHAR2(15<br>0) | -                                   | -                                    | -                   | -               |

**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b>                | <b>Comments</b>   |
|--|------------------|-----------------------------|------------------------------|------------------------------------|---|
| ATTRIBUTE9                                 | VARCHAR2(150)    | -                           | -                            | -                                  | -   |
| AUTO_ASSIGNMENT_TYPE                       | VARCHAR2         | -                           | -                            | -                                  | -   |
| AUTO_REGISTER_FLAG                         | VARCHAR2(1)      | -                           | -                            | -                                  | -   |
| BUDGET_AMOUNT                              | NUMBER           | -                           | -                            | -                                  | -   |
| BUDGET_AMOUNT_1                            | NUMBER           | -                           | -                            | -                                  | -   |
| BUDGET_AMOUNT_2                            | NUMBER           | -                           | -                            | -                                  | -   |
| BUDGET_AMOUNT_3                            | NUMBER           | -                           | -                            | -                                  | -   |
| BUDGET_AMOUNT_4                            | NUMBER           | -                           | -                            | -                                  | -   |
| BUDGET_AMOUNT_5                            | NUMBER           | -                           | -                            | -                                  | -   |
| BUDGET_STATUS_CODE                         | VARCHAR2         | -                           | -                            | -                                  | -   |
| CANCELLATION_CODE                          | NUMBER           | -                           | -                            | -                                  | -   |
| CANCELLATION_REASON_CODE                   | VARCHAR2(30)     | -                           | -                            | AMS_EVENT_REG_CANCEL_REASON LOOKUP | -   |
| CHANNEL_CODE                               | VARCHAR2         | -                           | -                            | -                                  | -   |
| CLOSE_REASON                               | VARCHAR2         | -                           | -                            | -                                  | -   |
| CNT_PNT_CONTENT_SOURCE_TYPE                | VARCHAR2         | -                           | -                            | -                                  | This is a mandatory column in HZ_CONTACT_POINTS, but if not given, default it to 'USER_ENTERED' |
| CNT_PNT_TIME_ZONE                          | VARCHAR2         | -                           | -                            | -                                  | -   |
| CONFIRMED_FLAG                             | VARCHAR2(1)      | -                           | -                            | -                                  | -   |



**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b> | <b>Comments</b>  |
|--|------------------|-----------------------------|------------------------------|---------------------|--|
| CONTACT_KEY                                | VARCHAR2         | -                           | -                            | -                   | Stores the Contact Key generated   |
| CONTACT_NUMBER                             | VARCHAR2         | -                           | -                            | -                   | -  |
| CONTACT_PARTY_ID                           | NUMBER           | -                           | -                            | -                   | -  |
| CONTACT_ROLE_CODE                          | VARCHAR2         | -                           | -                            | -                   | -  |
| CONTENT_SOURCE_TYPE                        | VARCHAR2         | -                           | -                            | -                   | This is a mandatory column in HZ_LOCATIONS, but if not given, default it to 'USER_ENTERED' |
| CREATED_BY                                 | NUMBER           | Yes                         | -                            | -                   | Populated by the list import program.  |
| CREATION_DATE                              | DATE             | Yes                         | -                            | -                   | Populated by the list import program.  |
| CURRENCY_CODE                              | VARCHAR2         | -                           | -                            | -                   | -  |
| CUSTOMER_KEY                               | VARCHAR2         | -                           | -                            | -                   | Stores the customer Key generated  |
| DATE_REGISTRATION_PLACED                   | DATE             | -                           | -                            | -                   | -  |
| DECISION_MAKER_FLAG                        | VARCHAR2         | -                           | -                            | -                   | -  |
| DECISION_TIMEFRAME_CODE                    | VARCHAR2         | -                           | -                            | -                   | -  |
| DELETED_FLAG                               | VARCHAR2         | -                           | -                            | -                   | -  |
| DEPARTMENT                                 | VARCHAR2         | -                           | -                            | -                   | -  |
| DEPARTMENT_CODE                            | VARCHAR2         | -                           | -                            | -                   | -  |
| DESCRIPTION                                | VARCHAR2         | -                           | -                            | -                   | -  |
| DESCRIPTION                                | VARCHAR2         | -                           | -                            | -                   | -  |
| DO_NOT_EMAIL_FLAG                          | VARCHAR2         | -                           | -                            | -                   | If 'Y' then no emails sent to Contact.   |

**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b>    | <b>Comments</b>                        |
|--|------------------|-----------------------------|------------------------------|------------------------|--|
| DO_NOT_FAX_FLAG                            | VARCHAR2         | -                           | -                            | -                      | If 'Y' then no fax sent to Contact.    |
| DO_NOT_PHONE_FLAG                          | VARCHAR2         | -                           | -                            | -                      | If 'Y' then no phone calls to Contact. |
| DUNS_NUMBER                                | VARCHAR2         | -                           | -                            | -                      | -                                      |
| EMAIL_FORMAT                               | VARCHAR2         | -                           | -                            | -                      | -                                      |
| EVALUATED_FLAG                             | VARCHAR2(1)      | -                           | -                            | -                      | -                                      |
| EVENT_OFFER_ID                             | NUMBER           | -                           | Yes                          | AMS_EVENT_OFFERS_ALL_B | -                                      |
| FA_LOCATION_ID                             | NUMBER           | -                           | -                            | -                      | -                                      |
| FAX_AREA_CODE                              | VARCHAR2         | -                           | -                            | -                      | -                                      |
| FAX_COUNTRY_CODE                           | VARCHAR2         | -                           | -                            | -                      | -                                      |
| FAX_EXTENSION                              | VARCHAR2         | -                           | -                            | -                      | -                                      |
| FAX_NUMBER                                 | VARCHAR2         | -                           | -                            | -                      | -                                      |
| FLOOR                                      | VARCHAR2         | -                           | -                            | -                      | -                                      |
| GROUP_TYPE                                 | VARCHAR2         | -                           | -                            | -                      | -                                      |
| GSA_INDICATOR_FLAG                         | VARCHAR2         | -                           | -                            | -                      | -                                      |
| HOUSE_NUMBER                               | VARCHAR2         | -                           | -                            | -                      | -                                      |
| HQ_BRANCH_IND                              | NUMBER           | -                           | -                            | -                      | -                                      |
| IMPORT_FLAG                                | NUMBER           | -                           | -                            | -                      | -                                      |
| IMPORT_LIST_HEADER_ID                      | NUMBER           | Yes                         | -                            | -                      | Auto Generated                         |
| IMPORT_SOURCE_LINE_ID                      | NUMBER           | Yes                         | -                            | -                      | Auto Generated                         |
| IMPORT_SUCCESSFUL_FLAG                     | VARCHAR2(1)      | -                           | -                            | -                      | Populated by the list import program.  |

**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field<br/>in Import File</b> | <b>Data Type</b> | <b>Table<br/>Requires<br/>Entry</b> | <b>Import<br/>Requires<br/>Entry</b> | <b>Valid Values</b> | <b>Comments</b>           |
|--|------------------|-------------------------------------|--------------------------------------|---------------------|---------------------------|
| INBOUND_CHANNEL_ID                             | NUMBER           | -                                   | -                                    | -                   | -                         |
| INBOUND_MEDIA_ID                               | NUMBER           | -                                   | -                                    | -                   | -                         |
| INCUMBENT_PARTNER_PARTY_ID                     | NUMBER           | -                                   | -                                    | -                   | Partner specific          |
| INCUMBENT_PARTNER_RESOURCE_ID                  | NUMBER           | -                                   | -                                    | -                   | Partner specific          |
| INTEREST_TYPE_ID_1                             | NUMBER           | -                                   | -                                    | -                   | -                         |
| INTEREST_TYPE_ID_2                             | NUMBER           | -                                   | -                                    | -                   | -                         |
| INTEREST_TYPE_ID_3                             | NUMBER           | -                                   | -                                    | -                   | -                         |
| INTEREST_TYPE_ID_4                             | NUMBER           | -                                   | -                                    | -                   | -                         |
| INTEREST_TYPE_ID_5                             | NUMBER           | -                                   | -                                    | -                   | -                         |
| INVENTORY_ITEM_ID_1                            | NUMBER           | -                                   | -                                    | -                   | -                         |
| INVENTORY_ITEM_ID_2                            | NUMBER           | -                                   | -                                    | -                   | -                         |
| INVENTORY_ITEM_ID_3                            | NUMBER           | -                                   | -                                    | -                   | -                         |
| INVENTORY_ITEM_ID_4                            | NUMBER           | -                                   | -                                    | -                   | -                         |
| INVENTORY_ITEM_ID_5                            | NUMBER           | -                                   | -                                    | -                   | -                         |
| INVITE_ONLY_OVERRIDE_FLAG                      | VARCHAR2(1)      | -                                   | -                                    | -                   | -                         |
| JGZZ_FISCAL_CODE                               | VARCHAR2         | -                                   | -                                    | -                   | -                         |
| JOB_TITLE_CODE                                 | VARCHAR2         | -                                   | -                                    | -                   | Stores the job title code |
| KEEP_FLAG                                      | VARCHAR2         | -                                   | -                                    | -                   | -                         |
| KNOWN_AS                                       | VARCHAR2         | -                                   | -                                    | -                   | -                         |
| KNOWN_AS2                                      | VARCHAR2         | -                                   | -                                    | -                   | -                         |

**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b>                | <b>Comments</b>   |
|--|------------------|-----------------------------|------------------------------|------------------------------------|---|
| KNOWN_AS3                                  | VARCHAR2         | -                           | -                            | -                                  | -   |
| KNOWN_AS4                                  | VARCHAR2         | -                           | -                            | -                                  | -   |
| KNOWN_AS5                                  | VARCHAR2         | -                           | -                            | -                                  | -   |
| LANGUAGE                                   | VARCHAR2         | -                           | -                            | -                                  | -   |
| LANGUAGE_NAME                              | VARCHAR2         | -                           | -                            | -                                  | -   |
| LAST_ORDERED_DATE                          | VARCHAR2         | -                           | -                            | -                                  | -   |
| LAST_REG_STATUS_DATE                       | DATE             | -                           | -                            | Date when the registration closed. | -   |
| LAST_UPDATE_LOGIN                          | NUMBER           | Yes                         | -                            | -                                  | Populated by the list import program.   |
| LAST_UPDATED_BY                            | NUMBER           | Yes                         | -                            | -                                  | Populated by the list import program.   |
| LEAD_DATE                                  | DATE             | -                           | -                            | -                                  | -   |
| LEAD_NUMBER                                | VARCHAR2         | -                           | -                            | -                                  | -   |
| LEAD_RANK_ID                               | NUMBER           | -                           | -                            | -                                  | Stores the sales lead rank id. Need not supply if supplied will get validated |
| LOAD_ERROR_MESSAGE                         | VARCHAR2         | -                           | -                            | -                                  | Currently, not used. To find the error messages, query from ams_errors        |
| LOC_DESCRIPTION                            | VARCHAR2         | -                           | -                            | -                                  | -   |
| LOC_HIERARCHY_ID                           | NUMBER           | -                           | -                            | -                                  | -   |
| LOC_VALIDATED_FLAG                         | VARCHAR2         | -                           | -                            | -                                  | -   |
| LOCATION_DIRECTIONS                        | VARCHAR2         | -                           | -                            | -                                  | -   |
| LOCATION_ID                                | NUMBER           | -                           | -                            | -                                  | Location Id to which address info is mapped                                   |

**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field<br/>in Import File</b> | <b>Data Type</b> | <b>Table<br/>Requires<br/>Entry</b> | <b>Import<br/>Requires<br/>Entry</b> | <b>Valid Values</b> | <b>Comments</b>  |
|--|------------------|-------------------------------------|--------------------------------------|---------------------|--|
| MAIL_STOP                                      | VARCHAR2         | -                                   | -                                    | -                   | -  |
| MAILSTOP                                       | VARCHAR2         | -                                   | -                                    | -                   | -  |
| MARKETING_SCORE                                | NUMBER           | -                                   | -                                    | -                   | -  |
| MAX_ATTENDEE_OVERRIDE_FLAG                     | VARCHAR2(1)      | -                                   | -                                    | -                   | -  |
| MIDDLE_INITIAL                                 | VARCHAR2         | -                                   | -                                    | -                   | -  |
| MISSION_STATEMENT                              | VARCHAR2         | -                                   | -                                    | -                   | -  |
| NET_WORTH                                      | VARCHAR2         | -                                   | -                                    | -                   | free text format   |
| NEW_CON_FLAG                                   | VARCHAR2         | -                                   | -                                    | -                   | << DO NOT<br>POPULATE >> if 1 -<br>new contact, 0- existing<br>Contact                           |
| NEW_LOC_FLAG                                   | VARCHAR2         | -                                   | -                                    | -                   | << DO NOT<br>POPULATE >> if 1 -<br>this is a new location. If<br>0- this is already<br>existing. |
| NEW_PARTY_FLAG                                 | VARCHAR2         | -                                   | -                                    | -                   | << DO NOT<br>POPULATE >> If 1 -<br>party is newly created.<br>If 0, existing party is<br>used.   |
| NEW_PS_FLAG                                    | VARCHAR2         | -                                   | -                                    | -                   | << DO NOT<br>POPULATE >> if 1 -<br>new PS, if 0 - PS<br>already existing                         |
| NEW_REL_FLAG                                   | VARCHAR2         | -                                   | -                                    | -                   | << DO NOT<br>POPULATE >> if 1 -<br>new relationship, 0-<br>existing Rel                          |
| OBJECT_VERSION_NUMBER                          | NUMBER           | Yes                                 | -                                    | -                   | Populated by the list<br>import program.   |
| OFFER_ID                                       | NUMBER           | -                                   | -                                    | -                   | -  |

**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b> | <b>Comments</b>  |
|--|------------------|-----------------------------|------------------------------|---------------------|--|
| OFFER_ID_1                                 | NUMBER           | -                           | -                            | -                   | -  |
| OFFER_ID_2                                 | NUMBER           | -                           | -                            | -                   | -  |
| OFFER_ID_3                                 | NUMBER           | -                           | -                            | -                   | -  |
| OFFER_ID_4                                 | NUMBER           | -                           | -                            | -                   | -  |
| OFFER_ID_5                                 | NUMBER           | -                           | -                            | -                   | -  |
| ORDER_HEADER_ID                            | NUMBER           | -                           | -                            | -                   | -  |
| ORDER_LINE_ID                              | NUMBER           | -                           | -                            | -                   | -  |
| ORG_CNT_COMMENTS                           | VARCHAR2         | -                           | -                            | -                   | -  |
| ORG_CNT_TITLE                              | VARCHAR2         | -                           | -                            | -                   | -  |
| ORGANIZATION_ID_1                          | NUMBER           | -                           | -                            | -                   | -  |
| ORGANIZATION_ID_2                          | NUMBER           | -                           | -                            | -                   | -  |
| ORGANIZATION_ID_3                          | NUMBER           | -                           | -                            | -                   | -  |
| ORGANIZATION_ID_4                          | NUMBER           | -                           | -                            | -                   | -  |
| ORGANIZATION_ID_5                          | NUMBER           | -                           | -                            | -                   | -  |
| ORGANIZATION_NAME_PHONETIC                 | VARCHAR2         | -                           | -                            | -                   | -  |
| ORIG_SYSTEM_CODE                           | VARCHAR2         | -                           | -                            | -                   | Source application code where the lead originated example OTN        |
| ORIG_SYSTEM_REFERENCE                      | VARCHAR2         | -                           | -                            | -                   | May be populated as <orig_system_code> <identifier> example OTN10100 |

**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b> | <b>Comments</b>  |
|--|------------------|-----------------------------|------------------------------|---------------------|--|
| ORIGINAL_REGISTRANT_CONTACT_ID             | NUMBER           | -                           | Yes                          | -                   | -  |
| OWNER_USER_ID                              | NUMBER           | -                           | Yes                          | -                   | -  |
| PARENT_PROJECT                             | VARCHAR2         | -                           | -                            | -                   | -  |
| PARTIES_VALIDATED_FLAG                     | VARCHAR2         | -                           | -                            | -                   | -  |
| PARTY_ID                                   | NUMBER           | -                           | -                            | -                   | Party Id to which the customer info is mapped                            |
| PARTY_NUMBER                               | VARCHAR2         | -                           | -                            | -                   | -  |
| PARTY_REFERENCE_USE_FLAG                   | VARCHAR2         | -                           | -                            | -                   | -  |
| PARTY_SITE_ID                              | NUMBER           | -                           | -                            | -                   | Party Site Id to which the party and location info is mapped             |
| PARTY_SITE_NAME                            | VARCHAR2         | -                           | -                            | -                   | -  |
| PARTY_SITE_NUMBER                          | VARCHAR2         | -                           | -                            | -                   | Can be populated ONLY when profile "HZ Generate Party Number" set to 'N' |
| PARTY_TYPE                                 | VARCHAR2         | -                           | -                            | -                   | -  |
| PAYMENT_STATUS_CODE                        | VARCHAR2(30)     | -                           | -                            | -                   | -  |
| PERSON_FIRST_NAME_PHONETIC                 | VARCHAR2         | -                           | -                            | -                   | -  |
| PERSON_IDEN_TYPE                           | VARCHAR2         | -                           | -                            | -                   | -  |
| PERSON_IDENTIFIER                          | VARCHAR2         | -                           | -                            | -                   | -  |
| PERSON_LAST_NAME_PHONETIC                  | VARCHAR2         | -                           | -                            | -                   | -  |
| PERSON_NAME_SUFFIX                         | VARCHAR2         | -                           | -                            | -                   | -  |

**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b> | <b>Comments</b>  |
|--|------------------|-----------------------------|------------------------------|---------------------|------------------|
| PERSON_PREVIOUS_LAST_NAME                  | VARCHAR2         | -                           | -                            | -                   | -                |
| PHONE_CALLING_CALENDAR                     | VARCHAR2         | -                           | -                            | -                   | -                |
| PHONE_COUNTRY_CODE                         | VARCHAR2         | -                           | -                            | -                   | -                |
| PHONE_ID                                   | NUMBER           | -                           | -                            | -                   | DO NOT POPULATE  |
| PO_BOX_NUMBER                              | VARCHAR2         | -                           | -                            | -                   | -                |
| LOCATION_POSITION                          |                  | -                           | -                            | -                   | -                |
| POSTAL_PLUS4_CODE                          | VARCHAR2         | -                           | -                            | -                   | -                |
| PRIMARY_CONTACT_FLAG                       | VARCHAR2         | -                           | -                            | -                   | -                |
| PRIMARY_CONTACT_PER_ROLE_TYPE              | VARCHAR2         | -                           | -                            | -                   | 'Y' or 'N'       |
| PRIMARY_INTEREST_CODE_ID_1                 | NUMBER           | -                           | -                            | -                   | -                |
| PRIMARY_INTEREST_CODE_ID_2                 | NUMBER           | -                           | -                            | -                   | -                |
| PRIMARY_INTEREST_CODE_ID_3                 | NUMBER           | -                           | -                            | -                   | -                |
| PRIMARY_INTEREST_CODE_ID_4                 | NUMBER           | -                           | -                            | -                   | -                |
| PRIMARY_INTEREST_CODE_ID_5                 | NUMBER           | -                           | -                            | -                   | -                |
| PRIMARY_PER_TYPE                           | VARCHAR2         | -                           | -                            | -                   | 'Y' or 'N'       |
| PRM_ASSIGNMENT_TYPE                        | VARCHAR2         | -                           | -                            | -                   | -                |
| PRM_EXEC_SPONSOR_FLAG                      | VARCHAR2         | -                           | -                            | -                   | Partner specific |



**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b> | <b>Comments</b>   |
|--|------------------|-----------------------------|------------------------------|---------------------|---|
| PRM_IND_CLASSIFICATION_CODE                | VARCHAR2         | -                           | -                            | -                   | Partner specific  |
| PRM_PRJ_LEAD_IN_PLACE_FLAG                 | VARCHAR2         | -                           | -                            | -                   | Partner specific  |
| PRM_SALES_LEAD_TYPE                        | VARCHAR2         | -                           | -                            | -                   | Partner specific  |
| PROGRAM_APPLICATION_ID                     | NUMBER           | -                           | -                            | -                   | -   |
| PROGRAM_APPLICATION_ID                     | NUMBER           | -                           | -                            | -                   | ] DO NOT POPULATE   |
| PROGRAM_ID                                 | NUMBER           | -                           | -                            | -                   | -   |
| PROGRAM_ID                                 |                  | -                           | -                            | -                   | ] Concurrent process generated  |
| PROGRAM_UPDATE_DATE                        | DATE             | -                           | -                            | -                   | -   |
| PROGRAM_UPDATE_DATE                        | DATE             | -                           | -                            | -                   | -   |
| PROMOTION_CODE                             | VARCHAR2         | -                           | -                            | -                   | If given and promotion_id is not provided, then this will be transferred to promotion_id. |
| PROMOTION_ID                               | NUMBER           | -                           | -                            | -                   | If given, this is used for creating the sales lead header.                                |
| PROSPECT_FLAG                              | VARCHAR2(1)      | -                           | -                            | -                   | -   |
| PS_USES_COMMENTS                           | VARCHAR2         | -                           | -                            | -                   | -   |
| QUALIFIED_FLAG                             | VARCHAR2         | -                           | -                            | -                   | -   |
| QUANTITY_1                                 | NUMBER           | -                           | -                            | -                   | -   |
| QUANTITY_2                                 | NUMBER           | -                           | -                            | -                   | -   |
| QUANTITY_3                                 | NUMBER           | -                           | -                            | -                   | -   |

**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b>              | <b>Comments</b>   |
|--|------------------|-----------------------------|------------------------------|----------------------------------|---|
| QUANTITY_4                                 | NUMBER           | -                           | -                            | -                                | -   |
| QUANTITY_5                                 | NUMBER           | -                           | -                            | -                                | -   |
| RANK                                       | VARCHAR2         | -                           | -                            | -                                | -   |
| RAW_PHONE_NUMBER                           | VARCHAR2         | -                           | -                            | -                                | -   |
| REG_SOURCE_TYPE_CODE                       | VARCHAR2(30)     | -                           | -                            | AMS_EVENT_REG_SOURCE_TYPE LOOKUP | -   |
| REGISTRANT_ACCOUNT_ID                      | NUMBER           | -                           | Yes                          | CUSTOMER_ACCOUNT_ID              | -   |
| REGISTRANT_CONTACT_ID                      | NUMBER           | -                           | Yes                          | CONTACT_ID                       | -   |
| REGISTRANT_PARTY_ID                        | NUMBER           | -                           | Yes                          | PARTY_ID                         | -   |
| REGISTRATION_GROUP_ID                      | NUMBER           | -                           | Yes                          | -                                | -   |
| REGISTRATION_SOURCE_ID                     | NUMBER           | -                           | -                            | -                                | -   |
| REJECT_REASON_CODE                         | VARCHAR2         | -                           | -                            | -                                | -   |
| REL_PARTY_ID                               | NUMBER           | -                           | -                            | -                                | Relationship's party ID to which the relationship is mapped.                |
| REQUEST_ID                                 | NUMBER           | -                           | -                            | -                                | -   |
| REQUEST_ID                                 | NUMBER           | -                           | -                            | -                                | -   |
| ROLE_LEVEL                                 | VARCHAR2         | -                           | -                            | -                                | -   |
| SALES_LEAD_ID                              | NUMBER           | -                           | -                            | -                                | << DO NOT POPULATE >> Sales Lead ID to which the sales lead info is mapped. |
| SALES_TAX_GEOCODE                          | VARCHAR2         | -                           | -                            | -                                | -   |

**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field in Import File</b> | <b>Data Type</b> | <b>Table Requires Entry</b> | <b>Import Requires Entry</b> | <b>Valid Values</b>    | <b>Comments</b>  |
|--|------------------|-----------------------------|------------------------------|------------------------|--|
| SALES_TAX_INSIDE_CITY_LIMITS               | VARCHAR2         | -                           | -                            | -                      | -  |
| SALESREP_ID                                | NUMBER           | -                           | -                            | -                      | -  |
| SCORECARD_ID                               | NUMBER           | -                           | -                            | -                      | -  |
| SECONDARY_INTEREST_CODE_ID_1               | NUMBER           | -                           | -                            | -                      | -  |
| SECONDARY_INTEREST_CODE_ID_2               | NUMBER           | -                           | -                            | -                      | -  |
| SECONDARY_INTEREST_CODE_ID_3               | NUMBER           | -                           | -                            | -                      | -  |
| SECONDARY_INTEREST_CODE_ID_4               | NUMBER           | -                           | -                            | -                      | -  |
| SECONDARY_INTEREST_CODE_ID_5               | NUMBER           | -                           | -                            | -                      | -  |
| SECURITY_GROUP_ID                          | NUMBER           | -                           | -                            | -                      | -  |
| SECURITY_GROUP_ID                          | NUMBER           | -                           | -                            | -                      | -  |
| SHORT_DESCRIPTION                          | VARCHAR2         | -                           | -                            | -                      | -  |
| SIC_CODE_TYPE                              | VARCHAR2         | -                           | -                            | -                      | -  |
| SITE_USE_TYPE                              | VARCHAR2         | -                           | -                            | -                      | This is a mandatory column for HZ_PARTY_SITE_USES. But if not given, it will be defaulted to 'BILL_TO' |
| SOURCE_CODE                                | VARCHAR2(30)     | -                           | Yes                          | AMS_EVENT_OFFERS_ALL_B | -  |
| SOURCE_PROMOTION_ID_1                      | NUMBER           | -                           | -                            | -                      | -  |

**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field<br/>in Import File</b> | <b>Data Type</b> | <b>Table<br/>Requires<br/>Entry</b> | <b>Import<br/>Requires<br/>Entry</b> | <b>Valid Values</b>            | <b>Comments</b> |
|--|------------------|-------------------------------------|--------------------------------------|--------------------------------|-----------------|
| SOURCE_PROMOTION_ID_2                          | NUMBER           | -                                   | -                                    | -                              | -               |
| SOURCE_PROMOTION_ID_3                          | NUMBER           | -                                   | -                                    | -                              | -               |
| SOURCE_PROMOTION_ID_4                          | NUMBER           | -                                   | -                                    | -                              | -               |
| SOURCE_PROMOTION_ID_5                          | NUMBER           | -                                   | -                                    | -                              | -               |
| STREET   | VARCHAR2         | -                                   | -                                    | -                              | -               |
| STREET_NUMBER                                  | VARCHAR2         | -                                   | -                                    | -                              | -               |
| STREET_SUFFIX                                  | VARCHAR2         | -                                   | -                                    | -                              | -               |
| SUITE  | VARCHAR2         | -                                   | -                                    | -                              | -               |
| SYSTEM_STATUS_CODE                             | VARCHAR2(30)     | -                                   | -                                    | AMS_EVENT_REG_STATUS<br>LOOKUP | -               |
| TARGET_LIST_ID                                 | NUMBER           | -                                   | -                                    | -                              | -               |
| TAX_NAME                                       | VARCHAR2         | -                                   | -                                    | -                              | -               |
| TIME_ZONE                                      | VARCHAR2         | -                                   | -                                    | -                              | -               |
| TOTAL_NUM_OF_ORDERS                            | NUMBER           | -                                   | -                                    | -                              | -               |
| TOTAL_ORDERED_AMOUNT                           | NUMBER           | -                                   | -                                    | -                              | -               |
| UOM_CODE_1                                     | NUMBER           | -                                   | -                                    | -                              | -               |
| UOM_CODE_2                                     | NUMBER           | -                                   | -                                    | -                              | -               |
| UOM_CODE_3                                     | NUMBER           | -                                   | -                                    | -                              | -               |
| UOM_CODE_4                                     | NUMBER           | -                                   | -                                    | -                              | -               |
| UOM_CODE_5                                     | NUMBER           | -                                   | -                                    | -                              | -               |
| URGENT_FLAG                                    | VARCHAR2         | -                                   | -                                    | -                              | -               |

**Table D–4 Event List Import Fields (Cont.)**

| <b>Table Column / Field<br/>in Import File</b> | <b>Data Type</b> | <b>Table<br/>Requires<br/>Entry</b> | <b>Import<br/>Requires<br/>Entry</b> | <b>Valid Values</b>           | <b>Comments</b> |
|--|------------------|-------------------------------------|--------------------------------------|-------------------------------|-----------------|
| USER_STATUS_ID                                 | NUMBER           | -                                   | Yes                                  | AMS_USER_<br>STATUS<br>LOOKUP | -               |
| VEHICLE_RESPONSE_<br>CODE                      | VARCHAR2         | -                                   | -                                    | -                             | -               |
| WAITLISTED_<br>PRIORITY                        | VARCHAR2(30<br>) | -                                   | -                                    | -                             | -               |



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## Seeded User Statuses

This appendix describes the various seeded user statuses found in Oracle Marketing.

Topics include:

- [Section E.1, "User Status Overview"](#)
- [Section E.2, "Seeded User Statuses"](#)

## E.1 User Status Overview

User statuses can be created across the application for a combination of activity and status. Oracle Marketing is seeded with the following user statuses. These user statuses can be modified or extended to meet an organization’s business rules.

It is important to note that the addition of a high number of user statuses would mean that the number of values seen in the drop-down list for an object’s status will also increase.

## E.2 Seeded User Statuses

The seeded user status values are as follows:

**Table E–1    Seeded User Statuses**

| User Status For          | SYSTEM_STATUS | SYSTEM_NAME      | User Status Name     |
|--------------------------|---------------|------------------|----------------------|
| Budget Sourcing Status   | APPROVED      | Approved         | Approved             |
| Budget Sourcing Status   | CLOSED        | Closed           | Accounting Closed    |
| Budget Sourcing Status   | NEW           | Planning         | Planning             |
| Budget Sourcing Status   | PENDING       | Pending          | Pending Approval     |
| Budget Sourcing Status   | REJECTED      | Rejected         | Rejected by Approver |
| Budget Status            | ACTIVE        | Active           | Active               |
| Budget Status            | ARCHIVED      | Archived         | Archived             |
| Budget Status            | CANCELLED     | Cancelled        | Cancelled            |
| Budget Status            | CLOSED        | Closed           | Closed               |
| Budget Status            | DRAFT         | Draft            | Draft                |
| Budget Status            | ON_HOLD       | On Hold          | On Hold              |
| Budget Status            | PENDING       | Pending Approval | Pending Approval     |
| Budget Status            | REJECTED      | Rejected         | Rejected             |
| Campaign Schedule Status | ACTIVE        | Active           | Active               |
| Campaign Schedule Status | ARCHIVED      | Archived         | Archived             |
| Campaign Schedule Status | AVAILABLE     | Available        | Available            |
| Campaign Schedule Status | CANCELLED     | Cancelled        | Cancelled            |
| Campaign Schedule Status | CLOSED        | Closed           | Closed               |
| Campaign Schedule Status | COMPLETED     | Completed        | Completed            |



**Table E-1 Seeded User Statuses (Cont.)**

| User Status For          | SYSTEM_STATUS    | SYSTEM_NAME                 | User Status Name        |
|--------------------------|------------------|-----------------------------|-------------------------|
| Campaign Schedule Status | DENIED_BA        | Budget Rejected             | Denied Budget Approval  |
| Campaign Schedule Status | NEW              | New                         | New                     |
| Campaign Schedule Status | ON_HOLD          | Active Locked               | On Hold                 |
| Campaign Schedule Status | SUBMITTED_BA     | Pending Budget Approval     | Pending Budget Approval |
| Campaign Status          | ACTIVE           | Active                      | Active                  |
| Campaign Status          | ARCHIVED         | Archived                    | Archived                |
| Campaign Status          | AVAILABLE        | Available                   | Available               |
| Campaign Status          | CANCELLED        | Cancelled                   | Cancelled               |
| Campaign Status          | CLOSED           | Closed                      | Closed                  |
| Campaign Status          | COMPLETED        | Completed                   | Completed               |
| Campaign Status          | DENIED_BA        | Denied - Budget Approval    | Budget Denied           |
| Campaign Status          | DENIED_TA        | Denied - Theme Approval     | Theme Denied            |
| Campaign Status          | NEW              | New                         | New                     |
| Campaign Status          | ON_HOLD          | On-hold                     | On Hold                 |
| Campaign Status          | PLANNING         | Planning                    | Planned                 |
| Campaign Status          | SUBMITTED_BA     | Submitted - Budget Approval | Pending Budget approval |
| Campaign Status          | SUBMITTED_TA     | Submitted - Theme Approval  | Pending Theme approval  |
| Claim Status             | APPROVED         | Approved                    | Approved                |
| Claim Status             | CANCELLED        | Cancelled                   | Cancelled               |
| Claim Status             | CLOSED           | Closed                      | Closed                  |
| Claim Status             | COMPLETE         | Complete                    | Complete                |
| Claim Status             | DUPLICATE        | Duplicate                   | Duplicate               |
| Claim Status             | NEW              | New                         | New                     |
| Claim Status             | OPEN             | Open                        | Open                    |
| Claim Status             | PENDING          | Pending                     | Pending                 |
| Claim Status             | PENDING_APPROVAL | Pending Approval            | Pending Approval        |
| Claim Status             | PENDING_CLOSE    | Pending Close               | Pending Close           |

**Table E–1 Seeded User Statuses (Cont.)**

| User Status For    | SYSTEM_STATUS | SYSTEM_NAME                  | User Status Name         |
|--------------------|---------------|------------------------------|--------------------------|
| Claim Status       | REJECTED      | Rejected                     | Rejected                 |
| Deliverable Status | ARCHIVED      | Archived                     | Archived                 |
| Deliverable Status | AVAILABLE     | Available                    | Final Loaded             |
| Deliverable Status | BUDGET_APPR   | Budget Approved              | Budget Approval          |
| Deliverable Status | CANCELLED     | Cancelled                    | Cancelled                |
| Deliverable Status | DENIED_BA     | Denied - Budget Approval     | Budget Denied            |
| Deliverable Status | DENIED_TA     | Denied - Concept Approval    | Denied Concept Approval  |
| Deliverable Status | EXPIRED       | Expired                      | Expired                  |
| Deliverable Status | NEW           | New                          | New                      |
| Deliverable Status | SUBMITTED_BA  | Submitted - Budget Approval  | Pending Budget approval  |
| Deliverable Status | SUBMITTED_TA  | Submitted - Concept Approval | Pending Concept Approval |
| Deliverable Status | SUPERCEDED    | Superceded                   | Superceded               |
| List Import Status | COMPLETED     | Completed                    | Completed                |
| List Import Status | ERROR         | Error                        | Error                    |
| List Import Status | NEW           | New                          | New                      |
| List Import Status | PURGED        | Purged                       | Purged                   |
| List Import Status | SCHEDULED     | Scheduled                    | Scheduled                |
| List Import Status | STAGED        | Staged                       | Staged                   |
| List Status        | ARCHIVED      | Archived                     | Archived                 |
| List Status        | AVAILABLE     | Available                    | Available                |
| List Status        | CANCELLED     | Cancelled                    | Cancelled                |
| List Status        | DRAFT         | Draft                        | Draft                    |
| List Status        | EXECUTED      | Executed                     | Executed                 |
| List Status        | EXECUTING     | Executing                    | Executing                |
| List Status        | GENERATING    | Generating                   | Generating               |
| List Status        | LOCKED        | Locked                       | Locked                   |
| List Status        | SCHEDULED     | Scheduled                    | Scheduled                |
| List Status        | VALIDATED     | Validated                    | Validated                |

**Table E-1 Seeded User Statuses (Cont.)**

| User Status For                     | SYSTEM_STATUS | SYSTEM_NAME            | User Status Name |
|-------------------------------------|---------------|------------------------|------------------|
| List Status                         | VALIDATING    | Validating             | Validating       |
| Marketing Event Agenda Status       | CONFIRMED     | Confirmed              | Confirmed        |
| Marketing Event Agenda Status       | UNCONFIRMED   | Unconfirmed            | Unconfirmed      |
| Marketing Event Registration Status | CANCELLED     | Cancelled              | Cancelled        |
| Marketing Event Registration Status | ENROLLED      | Enrolled               | Enrolled         |
| Marketing Event Registration Status | REGISTERED    | Registered             | Registered       |
| Marketing Event Registration Status | TARGETED      | Targeted               | Targeted         |
| Marketing Event Registration Status | WAITLISTED    | Waitlisted             | Waitlisted       |
| Marketing Event Speaker Status      | BOOKED        | Booked                 | Booked           |
| Marketing Event Speaker Status      | CANCELLED     | Cancelled              | Cancelled        |
| Marketing Event Speaker Status      | CONFIRMED     | Confirmed              | Confirmed        |
| Marketing Event Speaker Status      | SCHEDULED     | Scheduled              | Scheduled        |
| Marketing Event Status              | ACTIVE        | Active                 | Active           |
| Marketing Event Status              | ARCHIVED      | Archived               | Archived         |
| Marketing Event Status              | AVAILABLE     | Available              | Available        |
| Marketing Event Status              | CANCELLED     | Cancelled              | Cancelled        |
| Marketing Event Status              | CLOSED        | Closed                 | Closed           |
| Marketing Event Status              | COMPLETED     | Completed              | Completed        |
| Marketing Event Status              | DENIED_BA     | Denied Budget Approval | Budget Denied    |
| Marketing Event Status              | DENIED_TA     | Denied Theme Approval  | Theme Denied     |
| Marketing Event Status              | NEW           | New                    | New              |
| Marketing Event Status              | ON_HOLD       | On Hold                | On Hold          |
| Marketing Event Status              | PLANNING      | Planning               | Planned          |

**Table E-1 Seeded User Statuses (Cont.)**

| User Status For        | SYSTEM_STATUS  | SYSTEM_NAME               | User Status Name            |
|------------------------|----------------|---------------------------|-----------------------------|
| Marketing Event Status | SUBMITTED_BA   | Submitted Budget Approval | Pending Budget approval     |
| Marketing Event Status | SUBMITTED_TA   | Submitted Theme Approval  | Pending Theme approval      |
| Model Status           | ARCHIVED       | Archived                  | Archived                    |
| Model Status           | AVAILABLE      | Available                 | Available                   |
| Model Status           | BUILDING       | Building                  | Building                    |
| Model Status           | CUSTOM         | Custom                    | Custom                      |
| Model Status           | DRAFT          | Draft                     | Draft                       |
| Model Status           | EXPIRED        | Expired                   | Expired                     |
| Model Status           | QUEUED         | Queued                    | Queued                      |
| Model Status           | SCHEDULED      | Scheduled                 | Scheduled                   |
| Model Status           | SCORING        | Scoring                   | Scoring                     |
| Offer Status           | ACTIVE         | Active                    | Active                      |
| Offer Status           | ARCHIVED       | Archived                  | Archived                    |
| Offer Status           | CANCELLED      | Cancelled                 | Cancelled                   |
| Offer Status           | CLOSED         | Closed                    | Closed                      |
| Offer Status           | COMPLETED      | Completed                 | Completed                   |
| Offer Status           | DRAFT          | Draft                     | Draft                       |
| Offer Status           | ONHOLD         | On Hold                   | On-Hold                     |
| Offer Status           | PENDING        | Pending Budget Approval   | Submitted - Budget Approval |
| Offer Status           | PENDING_ACTIVE | Pending Active            | Pending Active              |
| Offer Status           | REJECTED       | Budget Rejected           | Rejected - Budget Approval  |
| Offer Status           | TERMINATED     | Terminated                | Terminated                  |
| Price List Statuses    | ACTIVE         | Active                    | Active                      |
| Price List Statuses    | CANCELLED      | Cancelled                 | Cancelled                   |
| Price List Statuses    | DRAFT          | Draft                     | Draft                       |
| Price List Statuses    | PENDING        | Submitted For Approval    | Submitted For Approval      |
| Price List Statuses    | REJECTED       | Rejected                  | Rejected                    |
| Program Status         | ACTIVE         | Active                    | Active                      |

**Table E-1 Seeded User Statuses (Cont.)**

| User Status For | SYSTEM_STATUS | SYSTEM_NAME | User Status Name |
|-----------------|---------------|-------------|------------------|
| Program Status  | ARCHIVED      | Archived    | Archived         |
| Program Status  | CANCELLED     | Cancelled   | Cancelled        |
| Program Status  | COMPLETED     | Completed   | Completed        |
| Program Status  | NEW           | Draft       | Draft            |
| Program Status  | ON_HOLD       | On Hold     | On Hold          |
| Score status    | ARCHIVED      | Archived    | Archived         |
| Score status    | COMPLETED     | Completed   | Completed        |
| Score status    | DRAFT         | Draft       | Draft            |
| Score status    | QUEUED        | Queued      | Queued           |
| Score status    | SCHEDULED     | Scheduled   | Scheduled        |
| Score status    | SCORING       | Scoring     | Running          |
| Segment Status  | ARCHIVED      | Archived    | Archived         |
| Segment Status  | AVAILABLE     | Available   | Available        |
| Segment Status  | CANCELLED     | Cancelled   | Cancelled        |
| Segment Status  | DRAFT         | Draft       | Draft            |
| Segment Status  | EXPIRED       | Expired     | Expired          |



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## Seeded Data Source and Data Source Attribute Reference

This appendix describes seeded data sources and data source attributes used for Oracle Marketing list generation and data mining functionality.

Topics include:

- [Section F.1, "Seeded Data Sources"](#)
- [Section F.2, "Seeded Data Source Parent-Child Relationships"](#)
- [Section F.3, "Data Source Attribute Reference"](#)

## F.1 Seeded Data Sources

The following parent data sources are seeded for release 11.5.10:

- Person: Represents Business to Consumer (B2C) customer attributes such as first name, last name, marital status, household income, etc.
- Organization Contacts: Represents Business to Business (B2B) attributes such as first name, last name, job title, work e-mail address, etc.
- Organization: Represents organization attributes such as company name, business type, revenue, etc.

## F.2 Seeded Data Source Parent-Child Relationships

The following table describes parent-child relationships for each of the seeded data sources.

**Table F–1   Seeded Data Source Parent-Child Relationships**

| Parent Data Source | Child Data Sources   |
|--------------------|--|
| Persons            | <ul style="list-style-type: none"><li>■ Person Profile</li><li>■ Person Interest</li><li>■ Person Accounts</li><li>■ Person Education</li><li>■ Employment History</li><li>■ Phone1 – 6 (11.5.9)</li><li>■ Fax (11.5.9)</li><li>■ System Reference</li><li>■ Interactions</li><li>■ Leads</li><li>■ Order Detail</li><li>■ Install Base Details</li><li>■ Sales Access</li><li>■ Data Mining Aggregates</li><li>■ Data Mining Scores</li><li>■ Party Profitability</li></ul> |



**Table F-1 Seeded Data Source Parent-Child Relationships**

| Parent Data Source    | Child Data Sources   |
|-----------------------|--|
| Organization Contacts | <ul style="list-style-type: none"> <li>■ Organizations</li> <li>■ Organization Profiles</li> <li>■ Organization Accounts</li> <li>■ Phone1 – 6 (11.5.9)</li> <li>■ Fax (11.5.9)</li> <li>■ System Reference</li> <li>■ Interactions</li> <li>■ Leads</li> <li>■ Order Detail</li> <li>■ Install Base Details</li> <li>■ Sales Access</li> <li>■ Data Mining Aggregates</li> <li>■ Data Mining Score</li> <li>■ Party Profitability</li> <li>■ Person Profile</li> <li>■ Person Interest</li> <li>■ Person Education</li> <li>■ Employment History</li> </ul> |
| Organization          | <ul style="list-style-type: none"> <li>■ Organization Profiles</li> <li>■ Organization Accounts</li> <li>■ System Reference</li> <li>■ Order Detail</li> <li>■ Install Base Details</li> <li>■ Sales Access</li> <li>■ Data Mining Aggregates</li> <li>■ Data Mining Scores</li> <li>■ Party Profitability</li> </ul>  |

## F.3 Data Source Attribute Reference

The following table lists seeded data source attributes, the tables or logic from which attribute values are derived, and the name of the data source(s) that use the attribute.

**Table F–2 Data Source Attributes**

| Attribute                  | Source           | Data Source Name(s) |
|----------------------------|------------------|---------------------|
| ACCOUNT_ACTIVATION_DATE    | HZ_CUST_ACCOUNTS | Account             |
| ACCOUNT_ESTABLISHED_DATE   | HZ_CUST_ACCOUNTS | Account             |
| ACCOUNT_LIABLE_FLAG        | HZ_CUST_ACCOUNTS | Account             |
| ACCOUNT_NAME               | HZ_CUST_ACCOUNTS | Account             |
| ACCOUNT_NUMBER             | HZ_CUST_ACCOUNTS | Account             |
| ACCOUNT_TERMINATION_DATE   | HZ_CUST_ACCOUNTS | Account             |
| ACCT_LIFE_CYCLE_STATUS     | HZ_CUST_ACCOUNTS | Account             |
| AUTOPAY_FLAG               | HZ_CUST_ACCOUNTS | Account             |
| COMPETITOR_TYPE            | HZ_CUST_ACCOUNTS | Account             |
| COTERMINATE_DAY_MONTH      | HZ_CUST_ACCOUNTS | Account             |
| CREDIT_CLASSIFICATION_CODE | HZ_CUST_ACCOUNTS | Account             |
| CURRENT_BALANCE            | HZ_CUST_ACCOUNTS | Account             |
| CUST_ACCOUNT_ID            | HZ_CUST_ACCOUNTS | Account             |
| CUSTOMER_CLASS_CODE        | HZ_CUST_ACCOUNTS | Account             |
| CUSTOMER_TYPE              | HZ_CUST_ACCOUNTS | Account             |
| DATE_TYPE_PREFERENCE       | HZ_CUST_ACCOUNTS | Account             |
| DATES_NEGATIVE_TOLERANCE   | HZ_CUST_ACCOUNTS | Account             |
| DATES_POSITIVE_TOLERANCE   | HZ_CUST_ACCOUNTS | Account             |
| DEPARTMENT                 | HZ_CUST_ACCOUNTS | Account             |
| DEPOSIT_REFUND_METHOD      | HZ_CUST_ACCOUNTS | Account             |
| DORMANT_ACCOUNT_FLAG       | HZ_CUST_ACCOUNTS | Account             |
| FOB_POINT                  | HZ_CUST_ACCOUNTS | Account             |
| FREIGHT_TERM               | HZ_CUST_ACCOUNTS | Account             |

**Table F-2 Data Source Attributes (Cont.)**

| <b>Attribute</b>          | <b>Source</b>    | <b>Data Source Name(s)</b> |
|---------------------------|------------------|----------------------------|
| HELD_BILL_EXPIRATION_DATE | HZ_CUST_ACCOUNTS | Account                    |
| HIGH_PRIORITY_INDICATOR   | HZ_CUST_ACCOUNTS | Account                    |
| HOLD_BILL_FLAG            | HZ_CUST_ACCOUNTS | Account                    |
| HOTWATCH_SERVICE_FLAG     | HZ_CUST_ACCOUNTS | Account                    |
| HOTWATCH_SVC_BAL_IND      | HZ_CUST_ACCOUNTS | Account                    |
| ITEM_CROSS_REF_PREF       | HZ_CUST_ACCOUNTS | Account                    |
| MAJOR_ACCOUNT_NUMBER      | HZ_CUST_ACCOUNTS | Account                    |
| NOTIFY_FLAG               | HZ_CUST_ACCOUNTS | Account                    |
| NPA_NUMBER                | HZ_CUST_ACCOUNTS | Account                    |
| ORIG_SYSTEM_REFERENCE     | HZ_CUST_ACCOUNTS | Account                    |
| OVER_RETURN_TOLERANCE     | HZ_CUST_ACCOUNTS | Account                    |
| OVER_SHIPMENT_TOLERANCE   | HZ_CUST_ACCOUNTS | Account                    |
| PAYMENT_TERM_ID           | HZ_CUST_ACCOUNTS | Account                    |
| PERSON_NAME_SUFFIX        | HZ_CUST_ACCOUNTS | Account                    |
| PO_EFFECTIVE_DATE         | HZ_CUST_ACCOUNTS | Account                    |
| PO_EXPIRATION_DATE        | HZ_CUST_ACCOUNTS | Account                    |
| POSTAL_CODE               | HZ_CUST_ACCOUNTS | Account                    |
| PRICING_EVENT             | HZ_CUST_ACCOUNTS | Account                    |
| PRIMARY_SALESREP_ID       | HZ_CUST_ACCOUNTS | Account                    |
| PRIMARY_SPECIALIST_ID     | HZ_CUST_ACCOUNTS | Account                    |
| REALTIME_RATE_FLAG        | HZ_CUST_ACCOUNTS | Account                    |
| RESTRICTION_LIMIT_AMOUNT  | HZ_CUST_ACCOUNTS | Account                    |
| SALES_CHANNEL_CODE        | HZ_CUST_ACCOUNTS | Account                    |
| SECONDARY_SPECIALIST_ID   | HZ_CUST_ACCOUNTS | Account                    |
| SHIP_PARTIAL              | HZ_CUST_ACCOUNTS | Account                    |
| SHIP_VIA                  | HZ_CUST_ACCOUNTS | Account                    |
| SINGLE_USER_FLAG          | HZ_CUST_ACCOUNTS | Account                    |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>            | <b>Source</b>  | <b>Data Source Name(s)</b> |
|-----------------------------|--|----------------------------|
| SOURCE_CODE                 | HZ_CUST_ACCOUNTS   | Account                    |
| STATUS                      | HZ_CUST_ACCOUNTS   | Account                    |
| STATUS_UPDATE_DATE          | HZ_CUST_ACCOUNTS   | Account                    |
| SUSPENSION_DATE             | HZ_CUST_ACCOUNTS   | Account                    |
| TAX_CODE                    | HZ_CUST_ACCOUNTS   | Account                    |
| TAX_HEADER_LEVEL_FLAG       | HZ_CUST_ACCOUNTS   | Account                    |
| TAX_ROUNDING_RULE           | HZ_CUST_ACCOUNTS   | Account                    |
| UNDER_RETURN_TOLERANCE      | HZ_CUST_ACCOUNTS   | Account                    |
| UNDER_SHIPMENT_TOLERANCE    | HZ_CUST_ACCOUNTS   | Account                    |
| WATCH_ACCOUNT_FLAG          | HZ_CUST_ACCOUNTS   | Account                    |
| WATCH_BALANCE_INDICATOR     | HZ_CUST_ACCOUNTS   | Account                    |
| WRITE_OFF_ADJUSTMENT_AMOUNT | HZ_CUST_ACCOUNTS   | Account                    |
| WRITE_OFF_AMOUNT            | HZ_CUST_ACCOUNTS   | Account                    |
| WRITE_OFF_PAYMENT_AMOUNT    | HZ_CUST_ACCOUNTS   | Account                    |
| ACCOUNT_RECEIVABLE          | HZ_FINANCIAL_NUMBERS.<br>(FINANCIAL_NUMBER and<br>FINANCIAL_NUMBER_CURRENCY<br>where FINANCIAL_NUMBER_NAME<br>= 'ACCOUNTS_RECEIVABLE') | Data Mining<br>Aggregates  |
| AVG_CALL_LENGTH             | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| AVG_CLOSED_SRS              | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| AVG_COMPLAINTS              | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| AVG_DISC_OFFERED            | Derived using AMS_ACT_OFFERS and<br>AMS_CAMPAIGN_SCHEDULES_VL<br>fields  | Data Mining<br>Aggregates  |
| AVG_HOLD_TIME               | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| AVG_LEN_OF_EMP              | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |

**Table F-2 Data Source Attributes (Cont.)**

| <b>Attribute</b>          | <b>Source</b>   | <b>Data Source Name(s)</b> |
|---------------------------|---|----------------------------|
| AVG_ORDER_AMOUNT          | BIC_PARTY_SUMM. ORDER_AMT divided by ORDER_NUM  | Data Mining Aggregates     |
| AVG_RESOLVE_DAYS_1_MONTH  | BIC_PARTY_SUMM.AVG_SR_RESL_TIME   | Data Mining Aggregates     |
| AVG_RESOLVE_DAYS_3_MONTHS | BIC_PARTY_SUMM. AVG_SR_RESL_TIME over the last 3 months   | Data Mining Aggregates     |
| AVG_RESOLVE_DAYS_6_MONTHS | BIC_PARTY_SUMM. AVG_SR_RESL_TIME over the last 6 months   | Data Mining Aggregates     |
| AVG_RESOLVE_DAYS_YEAR     | BIC_PARTY_SUMM. AVG_SR_RESL_TIME over the past year   | Data Mining Aggregates     |
| AVG_TALK_TIME             | BIC_PARTY_SUMM. AVG_TALK_TIME   | Data Mining Aggregates     |
| AVG_TRANSFERS_PER_SR      | BIC_PARTY_SUMM  | Data Mining Aggregates     |
| AVG_UNITS_PER_ORDER       | BIC_PARTY_SUMM. ORDER_QTY divided by ORDER_NUM  | Data Mining Aggregates     |
| AVG_WORKLOAD              | BIC_PARTY_SUMM  | Data Mining Aggregates     |
| CAPITAL_AMOUNT            | "HZ_FINANCIAL_NUMBERS.[FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME IN ('ISSUED_CAPITAL', 'PAID_IN_CAPITAL', 'NOMINAL_CAPITAL', 'AUTHORIZED_CAPITAL')]" | Data Mining Aggregates     |
| CAPITAL_TYPE_INDICATOR    | HZ_FINANCIAL_NUMBERS.FINANCIAL_NUMBER_NAME (where FINANCIAL_NUMBER_NAME in ('ISSUED_CAPITAL', 'PAID_IN_CAPITAL', 'NOMINAL_CAPITAL', 'AUTHORIZED_CAPITAL'))                            | Data Mining Aggregates     |
| CLOSED_SRS                | BIC_PARTY_SUMM  | Data Mining Aggregates     |
| COGS                      | BIC_PARTY_SUMM  | Data Mining Aggregates     |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>         | <b>Source</b>  | <b>Data Source Name(s)</b> |
|--------------------------|--|----------------------------|
| CONTRACT_AMT             | BIC_PARTY_SUMM   | Data Mining Aggregates     |
| CONTRACT_DURATION        | BIC_PARTY_SUMM   | Data Mining Aggregates     |
| CONTRACTS_CUML           | BIC_PARTY_SUMM   | Data Mining Aggregates     |
| CURRENT_ASSETS           | HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'TOTAL_CURRENT_ASSETS')   | Data Mining Aggregates     |
| CURRENT_LIABILITIES      | HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'TOTAL_CURR_LIABILITIES') | Data Mining Aggregates     |
| DAYS_SINCE_FIRST_CONTACT | Derived using MIN (AMS_LIST_HEADERS_VL. SENT_OUT_DATE) where SENT_OUT_DATE is not Null and AMS_LIST_ENTRIES fields           | Data Mining Aggregates     |
| DAYS_SINCE_LAST_EVENT    | MAX (AMS_EVENT_OFFERS_VL.EVENT_START_DATE) where PARTY_ID in (AMS_EVENT_REGISTRATIONS.ATTENDANT_PARTY_ID)                    | Data Mining Aggregates     |
| DAYS_SINCE_LAST_TARGETED | Derived using MAX (AMS_LIST_HEADERS_VL. SENT_OUT_DATE) where party in AMS_LIST_ENTRIES. PARTY_ID                             | Data Mining Aggregates     |
| DEBT_TO_INCOME_RATIO     | HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY Where FINANCIAL_NUMBER_NAME = 'LONG_TERM_DEBT')         | Data Mining Aggregates     |
| ESCALATED_SRS            | BIC_PARTY_SUMM   | Data Mining Aggregates     |

**Table F-2 Data Source Attributes (Cont.)**

| <b>Attribute</b>  | <b>Source</b>   | <b>Data Source Name(s)</b> |
|---|---|----------------------------|
| FIRST_CALL_CL_RATE  | BIC_PARTY_SUMM  | Data Mining Aggregates     |
| GROSS_ANNUAL_INCOME   | HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'GROSS_INCOME')    | Data Mining Aggregates     |
| GROSS_ANNUAL_SALES  | HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'SALES')           | Data Mining Aggregates     |
| HZ_PARTY_SITE_USES.BEGIN_DATE and END_DATE for SITE_USE_TYPE = RESIDES_AT | HZ_PARTY_SITE_USES  | Data Mining Aggregates     |
| INACTIVE_CONTRACTS  | BIC_PARTY_SUMM  | Data Mining Aggregates     |
| LAST_TARGETED_CHANNEL_CODE  | Derived using AMS_CAMPAIGN_SCHEDULES_VL AMS_LIST_HEADERS_VL and AMS_LIST_ENTRIES fields                               | Data Mining Aggregates     |
| NET_PROFIT  | HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME='PROFIT_BEFORE_TAX') | Data Mining Aggregates     |
| NET_WORTH   | HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'NET_WORTH')       | Data Mining Aggregates     |
| NEW_CONTRACTS   | BIC_PARTY_SUMM  | Data Mining Aggregates     |
| NUM_OF_COMPLAINTS   | BIC_PARTY_SUMM  | Data Mining Aggregates     |
| NUM_OF_INTERACTIONS   | BIC_PARTY_SUMM  | Data Mining Aggregates     |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>          | <b>Source</b>  | <b>Data Source Name(s)</b> |
|---------------------------|--|----------------------------|
| NUM_OF_SR_1_MONTH         | BIC_PARTY_SUMM.SRS_LOGGED  | Data Mining Aggregates     |
| NUM_OF_SR_3_MONTHS        | SUM (BIC_PARTY_SUMM.SRS_LOGGED) over the last 3 months   | Data Mining Aggregates     |
| NUM_OF_SR_6_MONTHS        | SUM (BIC_PARTY_SUMM.SRS_LOGGED) over the last 6 months   | Data Mining Aggregates     |
| NUM_OF_SR_YEAR            | SUM (BIC_PARTY_SUMM.SRS_LOGGED) over the past year   | Data Mining Aggregates     |
| NUM_OF_TRANSFERS          | BIC_PARTY_SUMM   | Data Mining Aggregates     |
| NUM_TGT_BY_OFFR_TYP1      | Derived using AMS_LIST_ENTRIES<br>AMS_LIST_HEADERS_ALL AMS_<br>CAMPAIGN_SCHEDULES_B AMS_<br>ACT_OFFERS | Data Mining Aggregates     |
| NUM_TGT_BY_OFFR_TYP2      | Derived using AMS_LIST_ENTRIES<br>AMS_LIST_HEADERS_ALL AMS_<br>CAMPAIGN_SCHEDULES_B AMS_<br>ACT_OFFERS | Data Mining Aggregates     |
| NUM_TGT_BY_OFFR_TYP3      | Derived using AMS_LIST_ENTRIES<br>AMS_LIST_HEADERS_ALL AMS_<br>CAMPAIGN_SCHEDULES_B AMS_<br>ACT_OFFERS | Data Mining Aggregates     |
| NUM_TGT_BY_OFFR_TYP4      | Derived using AMS_LIST_ENTRIES<br>AMS_LIST_HEADERS_ALL AMS_<br>CAMPAIGN_SCHEDULES_B AMS_<br>ACT_OFFERS | Data Mining Aggregates     |
| NUM_TIMES_TARGETED        | AMS_LIST_HEADERS_VL.SENT_OUT_<br>DATE is not Null AND party is in AMS_<br>LIST_ENTRIES. PARTY_ID       | Data Mining Aggregates     |
| NUM_TIMES_TARGETED_DIRECT | Derived using AMS_LIST_ENTRIES<br>AMS_LIST_HEADERS_ALL AMS_<br>CAMPAIGN_SCHEDULES_B AMS_<br>MEDIA_VL   | Data Mining Aggregates     |
| NUM_TIMES_TARGETED_EMAIL  | Derived using AMS_LIST_ENTRIES<br>AMS_LIST_HEADERS_ALL AMS_<br>CAMPAIGN_SCHEDULES_B AMS_<br>MEDIA_VL   | Data Mining Aggregates     |



**Table F-2 Data Source Attributes (Cont.)**

| <b>Attribute</b>           | <b>Source</b>  | <b>Data Source Name(s)</b> |
|----------------------------|--|----------------------------|
| NUM_TIMES_TARGETED_TELEMKT | Derived using AMS_LIST_ENTRIES<br>AMS_LIST_HEADERS_ALL AMS_<br>CAMPAIGN_SCHEDULES_B AMS_<br>MEDIA_VL | Data Mining<br>Aggregates  |
| NUM_TYPES_DISC_OFFERED     | Derived using AMS_ACT_OFFERS And<br>AMS_CAMPAIGN_SCHEDULES_VL<br>fields                              | Data Mining<br>Aggregates  |
| ONTIME_PAYMENTS            | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| ONTIME_SHIP_PCT            | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| OPEN_CONTRACTS             | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| OPEN_SRS                   | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| ORDER_LINES_DELIVERED      | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| ORDER_LINES_ONTIME         | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| ORDER_QTY_CUML             | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| ORDER_RECENCY              | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| PARTY_ID                   | --   | Data Mining<br>Aggregates  |
| PAYMENTS                   | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| PERCT_CALL_REWORK          | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| PRODUCTS                   | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| REFERRALS                  | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |
| RENEWED_CONTRACTS          | BIC_PARTY_SUMM   | Data Mining<br>Aggregates  |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>        | <b>Source</b>   | <b>Data Source Name(s)</b> |
|-------------------------|---|----------------------------|
| REOPENED_SRS            | BIC_PARTY_SUMM  | Data Mining Aggregates     |
| RETAINED_EARNINGS       | HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'RETAINED_EARNINGS') | Data Mining Aggregates     |
| RETURN_BY_VALUE         | BIC_PARTY_SUMM  | Data Mining Aggregates     |
| RETURN_BY_VALUE_PCT     | BIC_PARTY_SUMM  | Data Mining Aggregates     |
| RETURNS                 | BIC_PARTY_SUMM  | Data Mining Aggregates     |
| SALES                   | BIC_PARTY_SUMM  | Data Mining Aggregates     |
| TIMES_TARGETED_12_MONTH | Derived using AMS_LIST_HEADERS_VL.SENT_OUT_DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ID for last year     | Data Mining Aggregates     |
| TIMES_TARGETED_3_MONTH  | Derived using AMS_LIST_HEADERS_VL.SENT_OUT_DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ID for last 3 months | Data Mining Aggregates     |
| TIMES_TARGETED_6_MONTH  | Derived using AMS_LIST_HEADERS_VL.SENT_OUT_DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ID for last 6 months | Data Mining Aggregates     |
| TIMES_TARGETED_9_MONTH  | Derived using AMS_LIST_HEADERS_VL.SENT_OUT_DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ID for last 9 months | Data Mining Aggregates     |
| TIMES_TARGETED_MONTH    | Derived using AMS_LIST_HEADERS_VL.SENT_OUT_DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ID for last month    | Data Mining Aggregates     |
| TOT_CALLS               | BIC_PARTY_SUMM  | Data Mining Aggregates     |

**Table F-2 Data Source Attributes (Cont.)**

| <b>Attribute</b>          | <b>Source</b>  | <b>Data Source Name(s)</b> |
|---------------------------|--|----------------------------|
| TOT_NUM_ORDER_3_MONTHS    | SUM (BIC_PARTY_SUMM.ORDER_QTY) over the past 3 months  | Data Mining Aggregates     |
| TOT_NUM_ORDER_6_MONTHS    | SUM (BIC_PARTY_SUMM.ORDER_QTY) over the past 6 months  | Data Mining Aggregates     |
| TOT_NUM_ORDER_9_MONTHS    | SUM (BIC_PARTY_SUMM.ORDER_QTY) over the past 9 months  | Data Mining Aggregates     |
| TOT_NUM_ORDER_YEAR        | SUM (BIC_PARTY_SUMM.ORDER_QTY) over the past year  | Data Mining Aggregates     |
| TOT_ORDER_AMOUNT_3_MONTHS | SUM (BIC_PARTY_SUMM.ORDER_AMT) over the past 3 months  | Data Mining Aggregates     |
| TOT_ORDER_AMOUNT_6_MONTHS | SUM (BIC_PARTY_SUMM.ORDER_AMT) over the past 6 months  | Data Mining Aggregates     |
| TOT_ORDER_AMOUNT_9_MONTHS | SUM (BIC_PARTY_SUMM.ORDER_AMT) over the past 9 months  | Data Mining Aggregates     |
| TOT_ORDER_AMOUNT_YEAR     | SUM (BIC_PARTY_SUMM.ORDER_AMT) over the past year  | Data Mining Aggregates     |
| TOTAL_ASSETS              | HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'TOTAL_ASSETS')   | Data Mining Aggregates     |
| TOTAL_DEBT_OUTSTANDING    | HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'LONG_TERM_DEBT') | Data Mining Aggregates     |
| TOTAL_SR_RESPONSE_TIME    | BIC_PARTY_SUMM   | Data Mining Aggregates     |
| ARC_USED_FOR_OBJECT       | AMS_DM_SOURCE  | Data Mining Scores         |
| CONTINUOUS_SCORE          | AMS_DM_SOURCE  | Data Mining Scores         |
| CREATED_BY                | ams_dm_scores_all_b  | Data Mining Scores         |
| CREATION_DATE             | ams_dm_scores_all_b  | Data Mining Scores         |
| DECILE                    | AMS_DM_SOURCE  | Data Mining Scores         |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>          | <b>Source</b>         | <b>Data Source Name(s)</b> |
|---------------------------|-----------------------|----------------------------|
| LAST_UPDATE_DATE          | ams_dm_scores_all_b   | Data Mining Scores         |
| LAST_UPDATE_LOGIN         | ams_dm_scores_all_b   | Data Mining Scores         |
| LAST_UPDATED_BY           | ams_dm_scores_all_b   | Data Mining Scores         |
| MODEL_ID                  | ams_dm_scores_all_b   | Data Mining Scores         |
| MODEL_NAME                | ams_dm_models_all_tl  | Data Mining Scores         |
| MODEL_TYPE                | ams_dm_scores_all_tl  | Data Mining Scores         |
| PARTY_ID                  | AMS_DM_SOURCE         | Data Mining Scores         |
| SCORE_ID                  | ams_dm_scores_all_b   | Data Mining Scores         |
| SCORE_NAME                | ams_dm_scores_all_tl  | Data Mining Scores         |
| USED_FOR_OBJECT_ID        | AMS_DM_SOURCE         | Data Mining Scores         |
| BEGIN_DATE                | HZ_EMPLOYMENT_HISTORY | Employment History         |
| BRANCH                    | HZ_EMPLOYMENT_HISTORY | Employment History         |
| EMPLOYED_AS_TITLE         | HZ_EMPLOYMENT_HISTORY | Employment History         |
| EMPLOYED_BY_DIVISION_NAME | HZ_EMPLOYMENT_HISTORY | Employment History         |
| EMPLOYED_BY_NAME_COMPANY  | HZ_EMPLOYMENT_HISTORY | Employment History         |
| EMPLOYMENT_HISTORY_ID     | HZ_EMPLOYMENT_HISTORY | Employment History         |
| END_DATE                  | HZ_EMPLOYMENT_HISTORY | Employment History         |
| MILITARY_RANK             | HZ_EMPLOYMENT_HISTORY | Employment History         |
| PARTY_ID                  | HZ_EMPLOYMENT_HISTORY | Employment History         |
| RESPONSIBILITY            | HZ_EMPLOYMENT_HISTORY | Employment History         |
| SERVED                    | HZ_EMPLOYMENT_HISTORY | Employment History         |
| STATION                   | HZ_EMPLOYMENT_HISTORY | Employment History         |
| SUPERVISOR_NAME           | HZ_EMPLOYMENT_HISTORY | Employment History         |
| ACTIVE_END_DATE           | CSI_ITEM_INSTANCES    | Install Base Details       |
| ACTIVE_START_DATE         | CSI_ITEM_INSTANCES    | Install Base Details       |
| ACTUAL_RETURN_DATE        | CSI_ITEM_INSTANCES    | Install Base Details       |
| CATEGORY_DESC             | CSI_ITEM_INSTANCES    | Install Base Details       |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>           | <b>Source</b>      | <b>Data Source Name(s)</b> |
|----------------------------|--------------------|----------------------------|
| CITY                       | CSI_ITEM_INSTANCES | Install Base Details       |
| COMPLETENESS_FLAG          | CSI_ITEM_INSTANCES | Install Base Details       |
| CONCAT_CAT_PARENTAGE       | CSI_ITEM_INSTANCES | Install Base Details       |
| CONCATENATED_SEGMENTS      | CSI_ITEM_INSTANCES | Install Base Details       |
| CONTEXT                    | CSI_ITEM_INSTANCES | Install Base Details       |
| COUNTRY                    | CSI_ITEM_INSTANCES | Install Base Details       |
| COUNTY                     | CSI_ITEM_INSTANCES | Install Base Details       |
| CREATED_BY                 | CSI_ITEM_INSTANCES | Install Base Details       |
| CREATION_COMPLETE_FLAG     | CSI_ITEM_INSTANCES | Install Base Details       |
| CREATION_DATE              | CSI_ITEM_INSTANCES | Install Base Details       |
| DESCRIPTION                | CSI_ITEM_INSTANCES | Install Base Details       |
| INSTALL_DATE               | CSI_ITEM_INSTANCES | Install Base Details       |
| INSTANCE_DESCRIPTION       | CSI_ITEM_INSTANCES | Install Base Details       |
| INSTANCE_ID                | CSI_ITEM_INSTANCES | Install Base Details       |
| INSTANCE_NUMBER            | CSI_ITEM_INSTANCES | Install Base Details       |
| INSTANCE_STATUS_ID         | CSI_ITEM_INSTANCES | Install Base Details       |
| INSTANCE_USAGE_MEANING     | CSI_ITEM_INSTANCES | Install Base Details       |
| INV_MASTER_ORGANIZATION_ID | CSI_ITEM_INSTANCES | Install Base Details       |
| INV_ORGANIZATION_ID        | CSI_ITEM_INSTANCES | Install Base Details       |
| INVENTORY_ITEM_ID          | CSI_ITEM_INSTANCES | Install Base Details       |
| ITEM_DESCRIPTION           | CSI_ITEM_INSTANCES | Install Base Details       |
| ITEM_TYPE                  | CSI_ITEM_INSTANCES | Install Base Details       |
| LAST_CUST_PO_NUMBER        | CSI_ITEM_INSTANCES | Install Base Details       |
| LAST_HEADER_ID             | CSI_ITEM_INSTANCES | Install Base Details       |
| LAST_LINE_ID               | CSI_ITEM_INSTANCES | Install Base Details       |
| LAST_LINE_NUMBER           | CSI_ITEM_INSTANCES | Install Base Details       |
| LAST_OE_ORDER_LINE_ID      | CSI_ITEM_INSTANCES | Install Base Details       |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>             | <b>Source</b>          | <b>Data Source Name(s)</b> |
|------------------------------|------------------------|----------------------------|
| LAST_ORDER_NUMBER            | CSI_ITEM_INSTANCES     | Install Base Details       |
| LOCATION_ID                  | CSI_ITEM_INSTANCES     | Install Base Details       |
| LOCATION_TYPE_CODE           | CSI_ITEM_INSTANCES     | Install Base Details       |
| LOT_CONTROL_CODE             | CSI_ITEM_INSTANCES     | Install Base Details       |
| MANUALLY_CREATED_FLAG        | CSI_ITEM_INSTANCES     | Install Base Details       |
| NAME                         | CSI_ITEM_INSTANCES     | Install Base Details       |
| OWNER_PARTY_ACCOUNT_ID       | CSI_ITEM_INSTANCES     | Install Base Details       |
| OWNER_PARTY_ID               | CSI_ITEM_INSTANCES     | Install Base Details       |
| PADDED_CONCATENATED_SEGMENTS | CSI_ITEM_INSTANCES     | Install Base Details       |
| POSTAL_CODE                  | CSI_ITEM_INSTANCES     | Install Base Details       |
| PROVINCE                     | CSI_ITEM_INSTANCES     | Install Base Details       |
| QUANTITY                     | CSI_ITEM_INSTANCES     | Install Base Details       |
| RETURN_BY_DATE               | CSI_ITEM_INSTANCES     | Install Base Details       |
| SERIAL_NUMBER_CONTROL_CODE   | CSI_ITEM_INSTANCES     | Install Base Details       |
| SHIPPED_DATE                 | CSI_ITEM_INSTANCES     | Install Base Details       |
| STATE                        | CSI_ITEM_INSTANCES     | Install Base Details       |
| TERMINATED_FLAG              | CSI_ITEM_INSTANCES     | Install Base Details       |
| UNIT_OF_MEASURE              | CSI_ITEM_INSTANCES     | Install Base Details       |
| ACTION                       | JTF_IH_ACTIONS_TL      | Interactions               |
| ACTION_ID                    | JTF_IH_ACTIVITIES      | Interactions               |
| ACTION_ITEM                  | JTF_IH_ACTION_ITEMS_TL | Interactions               |
| ACTION_ITEM_ID               | JTF_IH_ACTIVITIES      | Interactions               |
| ACTIVE                       | JTF_IH_ACTIVITIES      | Interactions               |
| ACTIVITY                     | JTF_IH_ACTION_ITEMS_TL | Interactions               |
| ACTIVITY_ID                  | JTF_IH_ACTIVITIES      | Interactions               |
| CREATION_DATE                | JTF_IH_ACTIVITIES      | Interactions               |
| CUST_ACCOUNT_ID              | JTF_IH_INTERACTIONS    | Interactions               |

**Table F-2 Data Source Attributes (Cont.)**

| <b>Attribute</b>       | <b>Source</b>       | <b>Data Source Name(s)</b> |
|------------------------|---------------------|----------------------------|
| DIRECTION              | JTF_IH_ACTIVITIES   | Interactions               |
| DOC_ID                 | JTF_IH_MEDIA_ITEMS  | Interactions               |
| DOC_REF                | JTF_IH_ACTIVITIES   | Interactions               |
| END_DATE_TIME          | JTF_IH_ACTIVITIES   | Interactions               |
| HANDLER_ID             | JTF_IH_ACTIVITIES   | Interactions               |
| INTERACTION_ID         | JTF_IH_INTERACTIONS | Interactions               |
| MEDIA_ID               | JTF_IH_ACTIVITIES   | Interactions               |
| MEDIA_ITEM_TYPE        | JTF_IH_ACTIVITIES   | Interactions               |
| OBJECT_ID              | JTF_IH_MEDIA_ITEMS  | Interactions               |
| OUTCOME_CODE           | JTF_IH_ACTIVITIES   | Interactions               |
| OUTCOME_DESCRIPTION    | JTF_IH_OUTCOMES_TL  | Interactions               |
| OUTCOME_ID             | JTF_IH_ACTIVITIES   | Interactions               |
| PARTY_ID               | JTF_IH_INTERACTIONS | Interactions               |
| POSITIVE_RESPONSE_FLAG | JTF_IH_RESULTS_TL   | Interactions               |
| REASON_CODE            | JTF_IH_REASONS_TL   | Interactions               |
| REASON_DESCRIPTION     | JTF_IH_ACTIVITIES   | Interactions               |
| REASON_ID              | JTF_IH_INTERACTIONS | Interactions               |
| RESOURCE_ID            | JTF_IH_RESULTS_TL   | Interactions               |
| RESULT_CODE            | JTF_IH_ACTIVITIES   | Interactions               |
| RESULT_DESCRIPTION     | JTF_IH_ACTIVITIES   | Interactions               |
| RESULT_ID              | JTF_IH_OUTCOMES_TL  | Interactions               |
| SCRIPT_ID              | JTF_IH_REASONS_TL   | Interactions               |
| SCRIPT_TRANS_ID        | JTF_IH_RESULTS_TL   | Interactions               |
| SOURCE_CODE            | JTF_IH_ACTIVITIES   | Interactions               |
| SOURCE_CODE_ID         | JTF_IH_ACTIVITIES   | Interactions               |
| START_DATE_TIME        | JTF_IH_ACTIVITIES   | Interactions               |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>        | <b>Source</b>       | <b>Data Source Name(s)</b>             |
|-------------------------|---------------------|--|
| PARTY_NAME              | HZ_PARTIES          | Interactions, Organization, and Person |
| ACCEPT_FLAG             | AS_SALES_LEADS      | Leads                                  |
| ADDRESS_ID              | AS_SALES_LEADS      | Leads                                  |
| ASSIGN_SALES_GROUP_ID   | AS_SALES_LEADS      | Leads                                  |
| ASSIGN_TO_PERSON_ID     | AS_SALES_LEADS      | Leads                                  |
| ASSIGN_TO_SALESFORCE_ID | AS_SALES_LEADS      | Leads                                  |
| BUDGET_AMOUNT           | AS_SALES_LEADS      | Leads                                  |
| BUDGET_STATUS           | AS_LOOKUPS          | Leads                                  |
| BUDGET_STATUS_CODE      | AS_SALES_LEADS      | Leads                                  |
| CATEGORY_ID             | AS_SALES_LEAD_LINES | Leads                                  |
| CATEGORY_SET_ID         | AS_SALES_LEAD_LINES | Leads                                  |
| CHANNEL_CODE            | AS_SALES_LEADS      | Leads                                  |
| CLOSE_REASON            | AS_SALES_LEADS      | Leads                                  |
| CONTACT_ROLE_CODE       | AS_SALES_LEADS      | Leads                                  |
| CREATION_DATE           | AS_SALES_LEADS      | Leads                                  |
| CURRENCY_CODE           | AS_SALES_LEADS      | Leads                                  |
| CUSTOMER_ID             | AS_SALES_LEADS      | Leads                                  |
| DECISION_TIMEFRAME_CODE | AS_SALES_LEADS      | Leads                                  |
| DESCRIPTION             | AS_SALES_LEADS      | Leads                                  |
| GROUP_NAME              | AS_LOOKUPS          | Leads                                  |
| INVENTORY_ITEM_ID       | AS_SALES_LEAD_LINES | Leads                                  |
| LAST_UPDATE_DATE        | AS_SALES_LEADS      | Leads                                  |
| LEAD_NUMBER             | AS_SALES_LEADS      | Leads                                  |
| LEAD_RANK_CODE          | AS_SALES_LEADS      | Leads                                  |
| LEAD_RANK_ID            | AS_SALES_LEADS      | Leads                                  |
| LEAD_STATUS             | AS_STATUSES_TL      | Leads                                  |



**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>            | <b>Source</b>                | <b>Data Source Name(s)</b> |
|-----------------------------|------------------------------|----------------------------|
| ORGANIZATION_ID             | AS_SALES_LEAD_LINES          | Leads                      |
| ORIG_SYSTEM_REFERENCE       | AS_SALES_LEADS               | Leads                      |
| PRIMARY_CNT_PERSON_PARTY_ID | AS_SALES_LEADS               | Leads                      |
| PRIMARY_CONTACT_PARTY_ID    | AS_SALES_LEADS               | Leads                      |
| PRIMARY_CONTACT_PHONE_ID    | AS_SALES_LEADS               | Leads                      |
| QUALIFIED_FLAG              | AS_SALES_LEADS               | Leads                      |
| QUANTITY                    | AS_SALES_LEAD_LINES          | Leads                      |
| RANK                        | AS_SALES_LEAD_RANKS_TL       | Leads                      |
| SALES_CHANNEL               | ASO_I_SALES_CHANNELS_V       | Leads                      |
| SALES_LEAD_ID               | AS_SALES_LEADS               | Leads                      |
| SOURCE_PROMOTION_CODE       | AMS_P_SOURCE_CODES_V         | Leads                      |
| SOURCE_PROMOTION_ID         | AS_SALES_LEADS               | Leads                      |
| SOURCE_PROMOTION_NAME       | AMS_P_SOURCE_CODES_V         | Leads                      |
| STATUS_CODE                 | AS_SALES_LEADS               | Leads                      |
| TIME_FRAME                  | AS_SALES_LEADS               | Leads                      |
| UNIT_OF_MEASURE_TL          | MTL_UNITS_OF_MEASURE         | Leads                      |
| UOM_CODE                    | AS_SALES_LEAD_LINES          | Leads                      |
| URGENT_FLAG                 | AS_SALES_LEADS               | Leads                      |
| VEH_RESP_CODE_MEANING       | AS_LOOKUPS                   | Leads                      |
| VEHICLE_RESPONSE_CODE       | AS_SALES_LEADS               | Leads                      |
| CONCAT_CAT_PARENTAGE        | ENI_PROD_DEN_HRCHY_PARENTS_V | Leads and Order Details    |
| CONCATENATED_SEGMENTS       | MTL_SYSTEM_ITEMS_VL          | Leads and Order Details    |
| ITEM_DESCRIPTION            | MTL_SYSTEM_ITEMS_VL          | Leads and Order Details    |
| CATEGORY_DESC               | ENI_PROD_DEN_HRCHY_PARENTS_V | Leads and Order Details    |
| RESOURCE_NAME               | JTF_RS_RESOURCE_EXTNS        | Leads and Sales Access     |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>         | <b>Source</b>  | <b>Data Source Name(s)</b> |
|--------------------------|--|----------------------------|
| ACTUAL_ARRIVAL_DATE      | OE_ORDER_LINES_ALL   | Order Details              |
| ACTUAL_SHIPMENT_DATE     | OE_ORDER_LINES_ALL   | Order Details              |
| ATO_LINE_ID              | OE_ORDER_LINES_ALL   | Order Details              |
| BOOKED_DATE              | OE_ORDER_HEADERS_ALL   | Order Details              |
| BOOKED_FLAG              | OE_ORDER_LINES_ALL   | Order Details              |
| CANCELLED_FLAG           | OE_ORDER_LINES_ALL   | Order Details              |
| CANCELLED_QUANTITY       | OE_ORDER_LINES_ALL   | Order Details              |
| CREATION_DATE            | OE_ORDER_LINES_ALL   | Order Details              |
| EXTENDED_PRICE           | NVL(OL.UNIT_SELLING_PRICE,0)*(<br>NVL(OL.ORDERED_QUANTITY,0) -<br>NVL(OL.CANCELLED_QUANTITY,0) ) | Order Details              |
| FULFILLED_QUANTITY       | OE_ORDER_LINES_ALL   | Order Details              |
| HEADER_ID                | OE_ORDER_LINES_ALL   | Order Details              |
| INVENTORY_ITEM_ID        | MTL_SYSTEM_ITEMS_VL  | Order Details              |
| INVOICE_TO_ORG_ID        | OE_ORDER_LINES_ALL   | Order Details              |
| ITEM_NUMBER              | MTL_SYSTEM_ITEMS_VL  | Order Details              |
| LAST_UPDATE_DATE         | OE_ORDER_LINES_ALL   | Order Details              |
| LINE_CATEGORY_CODE       | OE_ORDER_LINES_ALL   | Order Details              |
| LINE_ID                  | OE_ORDER_LINES_ALL   | Order Details              |
| LINE_NUMBER              | OE_ORDER_LINES_ALL   | Order Details              |
| LINE_TYPE_ID             | OE_ORDER_LINES_ALL   | Order Details              |
| MARKETING_SOURCE_CODE_ID | OE_ORDER_HEADERS_ALL   | Order Details              |
| OPEN_FLAG                | OE_ORDER_LINES_ALL   | Order Details              |
| OPTION_NUMBER            | OE_ORDER_LINES_ALL   | Order Details              |
| ORDER_QUANTITY_UOM       | OE_ORDER_LINES_ALL   | Order Details              |
| ORDER_SOURCE_ID          | OE_ORDER_LINES_ALL   | Order Details              |
| ORDERED_DATE             | OE_ORDER_HEADERS_ALL   | Order Details              |
| ORDERED_QUANTITY         | OE_ORDER_LINES_ALL   | Order Details              |

**Table F-2 Data Source Attributes (Cont.)**

| <b>Attribute</b>        | <b>Source</b>            | <b>Data Source Name(s)</b> |
|-------------------------|--------------------------|----------------------------|
| ORG_ID                  | OE_ORDER_HEADERS_ALL     | Order Details              |
| PARTY_ID                | HZ_CUST_ACCOUNTS         | Order Details              |
| PRICING_QUANTITY        | OE_ORDER_LINES_ALL       | Order Details              |
| PRICING_QUANTITY_UOM    | OE_ORDER_LINES_ALL       | Order Details              |
| PROMISE_DATE            | OE_ORDER_LINES_ALL       | Order Details              |
| REQUEST_DATE            | OE_ORDER_LINES_ALL       | Order Details              |
| SALES_CHANNEL_CODE      | OE_ORDER_HEADERS_ALL     | Order Details              |
| SCHEDULE_ARRIVAL_DATE   | OE_ORDER_LINES_ALL       | Order Details              |
| SCHEDULE_SHIP_DATE      | OE_ORDER_LINES_ALL       | Order Details              |
| SHIP_TO_CONTACT_ID      | OE_ORDER_LINES_ALL       | Order Details              |
| SHIP_TO_ORG_ID          | OE_ORDER_LINES_ALL       | Order Details              |
| SHIPMENT_PRIORITY_CODE  | OE_ORDER_LINES_ALL       | Order Details              |
| SHIPPED_QUANTITY        | OE_ORDER_LINES_ALL       | Order Details              |
| SHIPPING_METHOD_CODE    | OE_ORDER_LINES_ALL       | Order Details              |
| SHIPPING_QUANTITY       | OE_ORDER_LINES_ALL       | Order Details              |
| SHIPPING_QUANTITY_UOM   | OE_ORDER_LINES_ALL       | Order Details              |
| SOLD_FROM_ORG_ID        | OE_ORDER_HEADERS_ALL     | Order Details              |
| SOLD_TO_ORG_ID          | OE_ORDER_HEADERS_ALL     | Order Details              |
| TRANSACTIONAL_CURR_CODE | OE_ORDER_HEADERS_ALL     | Order Details              |
| UNIT_LIST_PRICE         | OE_ORDER_LINES_ALL       | Order Details              |
| UNIT_SELLING_PRICE      | OE_ORDER_LINES_ALL       | Order Details              |
| ANALYSIS_FY             | HZ_ORGANIZATION_PROFILES | Organization               |
| AVG_HIGH_CREDIT         | HZ_ORGANIZATION_PROFILES | Organization               |
| BRANCH_FLAG             | HZ_ORGANIZATION_PROFILES | Organization               |
| CEO_NAME                | HZ_ORGANIZATION_PROFILES | Organization               |
| CEO_TITLE               | HZ_ORGANIZATION_PROFILES | Organization               |
| CONG_DIST_CODE          | HZ_ORGANIZATION_PROFILES | Organization               |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>              | <b>Source</b>            | <b>Data Source Name(s)</b> |
|-------------------------------|--------------------------|----------------------------|
| CONTROL_YR                    | HZ_ORGANIZATION_PROFILES | Organization               |
| CORPORATION_CLASS             | HZ_ORGANIZATION_PROFILES | Organization               |
| CREDIT_SCORE                  | HZ_ORGANIZATION_PROFILES | Organization               |
| CURR_FY_POTENTIAL_REVENUE     | HZ_ORGANIZATION_PROFILES | Organization               |
| CUSTOMER_KEY                  | HZ_PARTIES               | Organization               |
| DB_RATING                     | HZ_ORGANIZATION_PROFILES | Organization               |
| DISADV_8A_IND                 | HZ_ORGANIZATION_PROFILES | Organization               |
| EFFECTIVE_END_DATE            | HZ_ORGANIZATION_PROFILES | Organization               |
| EFFECTIVE_START_DATE          | HZ_ORGANIZATION_PROFILES | Organization               |
| EMP_AT_PRIMARY_ADR            | HZ_ORGANIZATION_PROFILES | Organization               |
| EMPLOYEES_TOTAL               | HZ_ORGANIZATION_PROFILES | Organization               |
| EXPORT_IND                    | HZ_ORGANIZATION_PROFILES | Organization               |
| FAILURE_SCORE                 | HZ_ORGANIZATION_PROFILES | Organization               |
| FAILURE_SCORE_NATL_PERCENTILE | HZ_ORGANIZATION_PROFILES | Organization               |
| FISCAL YEAREND_MONTH          | HZ_ORGANIZATION_PROFILES | Organization               |
| GLOBAL_FAILURE_SCORE          | HZ_ORGANIZATION_PROFILES | Organization               |
| GSA_INDICATOR_FLAG            | HZ_PARTIES               | Organization               |
| HIGH_CREDIT                   | HZ_ORGANIZATION_PROFILES | Organization               |
| HQ_BRANCH_IND                 | HZ_ORGANIZATION_PROFILES | Organization               |
| IMPORT_IND                    | HZ_ORGANIZATION_PROFILES | Organization               |
| INCorp_YEAR                   | HZ_ORGANIZATION_PROFILES | Organization               |
| INTERNAL_FLAG                 | HZ_ORGANIZATION_PROFILES | Organization               |
| LANGUAGE_NAME                 | HZ_PARTIES               | Organization               |
| LEGAL_STATUS                  | HZ_ORGANIZATION_PROFILES | Organization               |
| LINE_OF_BUSINESS              | HZ_ORGANIZATION_PROFILES | Organization               |
| LOCAL_BUS_IDEN_TYPE           | HZ_ORGANIZATION_PROFILES | Organization               |
| LOCAL_BUS_IDENTIFIER          | HZ_ORGANIZATION_PROFILES | Organization               |

**Table F-2 Data Source Attributes (Cont.)**

| <b>Attribute</b>              | <b>Source</b>            | <b>Data Source Name(s)</b>            |
|-------------------------------|--------------------------|---------------------------------------|
| PRIMARY_CONTACT_ID            | HZ_ORGANIZATION_PROFILES | Organization                          |
| STATUS                        | HZ_PARTIES               | Organization                          |
| TOTAL_EMPLOYEES_IND           | HZ_ORGANIZATION_PROFILES | Organization                          |
| VALIDATED_FLAG                | HZ_PARTIES               | Organization                          |
| PARTY_TYPE                    | HZ_PARTIES               | Organization and Organization Contact |
| GROUP_TYPE                    | HZ_PARTIES               | Organization and Organization Contact |
| NEXT_FY_POTENTIAL_REVENUE     | HZ_ORGANIZATION_PROFILES | Organization and Organization Contact |
| ORIG_SYSTEM_REFERENCE         | HZ_PARTIES               | Organization and Organization Contact |
| PUBLIC_PRIVATE_OWNERSHIP_FLAG | HZ_ORGANIZATION_PROFILES | Organization and Organization Contact |
| TAX_NAME                      | HZ_PARTIES               | Organization and Organization Contact |
| OOB_IND                       | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| ORGANIZATION_NAME             | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| ORGANIZATION_TYPE             | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| PARENT_SUB_IND                | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| PAYDEX_NORM                   | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| PAYDEX_SCORE                  | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| PAYDEX_THREE_MONTHS_AGO       | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| PREF_FUNCTIONAL_CURRENCY      | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>     | <b>Source</b>            | <b>Data Source Name(s)</b>            |
|----------------------|--------------------------|---------------------------------------|
| REGISTRATION_TYPE    | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| SIC_CODE             | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| SIC_CODE_TYPE        | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| SMALL_BUS_IND        | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| TOTAL_EMP_EST_IND    | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| TOTAL_EMP_MIN_IND    | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| TOTAL_NUM_OF_ORDERS  | HZ_PARTIES               | Organization and Organization Profile |
| TOTAL_ORDERED_AMOUNT | HZ_PARTIES               | Organization and Organization Profile |
| TOTAL_PAYMENTS       | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| WOMAN_OWNED_IND      | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| YEAR_ESTABLISHED     | HZ_ORGANIZATION_PROFILES | Organization and Organization Profile |
| LAST_ORDERED_DATE    | HZ_PARTIES               | Organization and Person               |
| PARTY_NUMBER         | HZ_PARTIES               | Organization and Person               |
| SALUTATION           | HZ_PARTIES               | Organization and Person               |
| CONTACT_ID           | HZ_PARTIES               | Organization Contact                  |
| CONTACT_NUMBER       | HZ_ORG_CONTACTS          | Organization Contact                  |
| CUSTOMER_KEY         | HZ_PARTIES               | Organization Contact                  |
| DECISION_MAKER_FLAG  | HZ_ORG_CONTACTS          | Organization Contact                  |
| DEPARTMENT           | HZ_ORG_CONTACTS          | Organization Contact                  |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>          | <b>Source</b>    | <b>Data Source Name(s)</b>      |
|---------------------------|------------------|---------------------------------|
| DEPARTMENT_CODE           | HZ_ORG_CONTACTS  | Organization Contact            |
| GENDER                    | HZ_PARTIES       | Organization Contact            |
| HQ_BRANCH_IND             | HZ_PARTIES       | Organization Contact            |
| JOB_TITLE                 | HZ_ORG_CONTACTS  | Organization Contact            |
| JOB_TITLE_CODE            | HZ_ORG_CONTACTS  | Organization Contact            |
| MANAGED_BY                | HZ_ORG_CONTACTS  | Organization Contact            |
| NATIVE_LANGUAGE           | HZ_ORG_CONTACTS  | Organization Contact            |
| ORGANIZATION_ID           | HZ_PARTIES       | Organization Contact            |
| ORGANIZATION_PARTY_NAME   | HZ_PARTIES       | Organization Contact            |
| PARTY_CONTACT_NAME        | HZ_ORG_CONTACTS  | Organization Contact            |
| PERSON_ACADEMIC_TITLE     | HZ_PARTIES       | Organization Contact            |
| PERSON_PREVIOUS_LAST_NAME | HZ_PARTIES       | Organization Contact            |
| PHONE_COUNTRY_CODE        | HZ_PARTIES       | Organization Contact            |
| PHONE_EXTENSION           | HZ_PARTIES       | Organization Contact            |
| PHONE_NUMBER              | HZ_PARTIES       | Organization Contact            |
| RANK                      | HZ_ORG_CONTACTS  | Organization Contact            |
| RELATIONSHIP_CODE         | HZ_RELATIONSHIPS | Organization Contact            |
| ROLE_TYPE                 | HZ_PARTIES       | Organization Contact            |
| SIC_CODE                  | HZ_PARTIES       | Organization Contact            |
| SIC_CODE_TYPE             | HZ_PARTIES       | Organization Contact            |
| TITLE                     | HZ_PARTIES       | Organization Contact            |
| VALIDATED_FLAG            | HZ_PARTIES       | Organization Contact            |
| EMAIL_ADDRESS             | HZ_PARTIES       | Organization Contact and Person |
| MAIL_STOP                 | HZ_ORG_CONTACTS  | Organization Contact and Person |
| PARTY_SITE_ID             | HZ_PARTIES       | Organization Contact and Person |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>        | <b>Source</b>            | <b>Data Source Name(s)</b>                     |
|-------------------------|--------------------------|--|
| PERSON_FIRST_NAME       | HZ_PARTIES               | Organization Contact and Person                |
| PERSON_LAST_NAME        | HZ_PARTIES               | Organization Contact and Person                |
| PERSON_MIDDLE_NAME      | HZ_PARTIES               | Organization Contact and Person                |
| PERSON_NAME_SUFFIX      | HZ_PARTIES               | Organization Contact and Person                |
| PERSON_PRE_NAME_ADJUNCT | HZ_PARTIES               | Organization Contact and Person                |
| PHONE_AREA_CODE         | HZ_PARTIES               | Organization Contact and Person                |
| PERSON_IDENTIFIER       | HZ_PARTIES               | Organization Contact and Person Profile        |
| MINORITY_OWNED_IND      | HZ_ORGANIZATION_PROFILES | Organization Profile                           |
| MINORITY_OWNED_TYPE     | HZ_ORGANIZATION_PROFILES | Organization Profile                           |
| PARTY_ID                | HZ_ORGANIZATION_PROFILES | Organization Profile                           |
| TAX_NAME                | HZ_ORGANIZATION_PROFILES | Organization Profile                           |
| TAX_REFERENCE           | HZ_ORGANIZATION_PROFILES | Organization Profile                           |
| TOTAL_EMPLOYEES_TEXT    | HZ_ORGANIZATION_PROFILES | Organization Profile                           |
| ADDRESS4                | HZ_PARTIES               | Organization and Organization Contact          |
| DUNS_NUMBER             | HZ_PARTIES               | Organization and Organization Contact          |
| POSTAL_CODE             | HZ_PARTIES               | Organization and Organization Contact          |
| PROVINCE                | HZ_PARTIES               | Organization and Organization Contact          |
| REFERENCE_USE_FLAG      | HZ_PARTIES               | Organization, Organization Contact, and Person |



**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b> | <b>Source</b>            | <b>Data Source Name(s)</b>                                       |
|------------------|--------------------------|--|
| COUNTY           | HZ_PARTIES               | Organization,<br>Organization Contact,<br>and Person             |
| KNOWN_AS         | HZ_PARTIES               | Organization,<br>Organization Contact,<br>and Person Profile     |
| TAX_REFERENCE    | HZ_PARTIES               | Organization,<br>Organization Contact,<br>Person                 |
| ADDRESS1         | HZ_PARTIES               | Organization,<br>Organization Contact,<br>Person, and Account    |
| ADDRESS2         | HZ_PARTIES               | Organization,<br>Organization Contact,<br>Person, and Account    |
| ADDRESS3         | HZ_PARTIES               | Organization,<br>Organization Contact,<br>Person, and Account    |
| CITY             | HZ_PARTIES               | Organization,<br>Organization Contact,<br>Person, and Account    |
| COUNTRY          | HZ_PARTIES               | Organization,<br>Organization Contact,<br>Person, and Account    |
| STATE            | HZ_PARTIES               | Organization,<br>Organization Contact,<br>Person, and Account    |
| URL              | HZ_PARTIES               | Organization,<br>Organization Contact,<br>Person, and Account    |
| JGZZ_FISCAL_CODE | HZ_PARTIES               | Organization,<br>Organization Contact,<br>Person, Person Profile |
| RENT_OWN_IND     | HZ_ORGANIZATION_PROFILES | Organization,<br>Organization Contact,<br>Person, Person Profile |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>        | <b>Source</b>                                       | <b>Data Source Name(s)</b>                     |
|-------------------------|---|--|
| PARTY_ID                | HZ_PARTIES  | Organization, Person, and Organization Contact |
| BEST_TIME_CONTACT_BEGIN | HZ_ORGANIZATION_PROFILES                            | Organization, Person, and Person Profile       |
| BEST_TIME_CONTACT_END   | HZ_ORGANIZATION_PROFILES                            | Organization, Person, and Person Profile       |
| CUSTOMER_KEY            | HZ_PARTIES  | Person   |
| LANGUAGE                | HZ_PARTY_SITES                                      | Person   |
| LAST_ORDERED_DATE       | HZ_PARTIES  | Person   |
| PARTY_SITE_NAME         | HZ_PARTY_SITES                                      | Person   |
| PHONE_COUNTRY_CODE      | HZ_CONTACT_POINTS                                   | Person   |
| PHONE_EXTENSION         | HZ_CONTACT_POINTS                                   | Person   |
| PHONE_NUMBER            | HZ_CONTACT_POINTS                                   | Person   |
| AGE                     | trunc(months_between(sysdate date_of_birth) / 12,0) | Person and Person Profile                      |
| DATE_OF_BIRTH           | HZ_PERSON_PROFILES                                  | Person and Person Profile                      |
| DATE_OF_DEATH           | HZ_PERSON_PROFILES                                  | Person and Person Profile                      |
| DECLARED_ETHNICITY      | HZ_PERSON_PROFILES                                  | Person and Person Profile                      |
| GENDER                  | HZ_PERSON_PROFILES                                  | Person and Person Profile                      |
| HEAD_OF_HOUSEHOLD_FLAG  | HZ_PERSON_PROFILES                                  | Person and Person Profile                      |
| HOUSEHOLD_INCOME        | HZ_PERSON_PROFILES                                  | Person and Person Profile                      |
| HOUSEHOLD_SIZE          | HZ_PERSON_PROFILES                                  | Person and Person Profile                      |
| INTERNAL_FLAG           | HZ_PERSON_PROFILES                                  | Person and Person Profile                      |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>              | <b>Source</b>      | <b>Data Source Name(s)</b> |
|-------------------------------|--------------------|----------------------------|
| MARITAL_STATUS                | HZ_PERSON_PROFILES | Person and Person Profile  |
| MARITAL_STATUS_EFFECTIVE_DATE | HZ_PERSON_PROFILES | Person and Person Profile  |
| PERSON_NAME                   | HZ_PERSON_PROFILES | Person and Person Profile  |
| PERSONAL_INCOME               | HZ_PERSON_PROFILES | Person and Person Profile  |
| PLACE_OF_BIRTH                | HZ_PERSON_PROFILES | Person and Person Profile  |
| COURSE_MAJOR                  | HZ_EDUCATION       | Person Education           |
| DEGREE_RECEIVED               | HZ_EDUCATION       | Person Education           |
| EDUCATION_ID                  | HZ_EDUCATION       | Person Education           |
| LAST_DATE_ATTENDED            | HZ_EDUCATION       | Person Education           |
| PARTY_ID                      | HZ_EDUCATION       | Person Education           |
| SCHOOL_ATTENDED_NAME          | HZ_EDUCATION       | Person Education           |
| START_DATE_ATTENDED           | HZ_EDUCATION       | Person Education           |
| TYPE_OF_SCHOOL                | HZ_EDUCATION       | Person Education           |
| INTEREST_NAME                 | HZ_PERSON_INTEREST | Person Interest            |
| INTEREST_TYPE_CODE            | HZ_PERSON_INTEREST | Person Interest            |
| LEVEL_OF_INTEREST             | HZ_PERSON_INTEREST | Person Interest            |
| LEVEL_OF_PARTICIPATION        | HZ_PERSON_INTEREST | Person Interest            |
| PARTY_ID                      | HZ_PERSON_INTEREST | Person Interest            |
| PERSON_INTEREST_ID            | HZ_PERSON_INTEREST | Person Interest            |
| SINCE                         | HZ_PERSON_INTEREST | Person Interest            |
| SUB_INTEREST_TYPE_CODE        | HZ_PERSON_INTEREST | Person Interest            |
| TEAM                          | HZ_PERSON_INTEREST | Person Interest            |
| AMS_PERSON_PROFILE_ID         | HZ_PERSON_PROFILES | Person Profile             |
| CONTENT_SOURCE_TYPE           | HZ_PERSON_PROFILES | Person Profile             |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>          | <b>Source</b>           | <b>Data Source Name(s)</b> |
|---------------------------|-------------------------|----------------------------|
| DECLARED_ETHNICITY        | HZ_PERSON_PROFILES      | Person Profile             |
| PARTY_ID                  | HZ_PERSON_PROFILES      | Person Profile             |
| PERSON_IDEN_TYPE          | HZ_PERSON_PROFILES      | Person Profile             |
| PERSON_PERVIOUS_LAST_NAME | HZ_PERSON_PROFILES      | Person Profile             |
| TAX_REFERENCE             | HZ_PERSON_PROFILES      | Person Profile             |
| ACCOUNTS1                 | FEM_PARTY_PROFITABILITY | Profitability              |
| ACCOUNTS2                 | FEM_PARTY_PROFITABILITY | Profitability              |
| ACCOUNTS3                 | FEM_PARTY_PROFITABILITY | Profitability              |
| ACCOUNTS4                 | FEM_PARTY_PROFITABILITY | Profitability              |
| ACCOUNTS5                 | FEM_PARTY_PROFITABILITY | Profitability              |
| BALANCE1                  | FEM_PARTY_PROFITABILITY | Profitability              |
| BALANCE2                  | FEM_PARTY_PROFITABILITY | Profitability              |
| BALANCE3                  | FEM_PARTY_PROFITABILITY | Profitability              |
| BALANCE4                  | FEM_PARTY_PROFITABILITY | Profitability              |
| BALANCE5                  | FEM_PARTY_PROFITABILITY | Profitability              |
| CACC_TOTAL                | FEM_PARTY_PROFITABILITY | Profitability              |
| CACC1                     | FEM_PARTY_PROFITABILITY | Profitability              |
| CACC2                     | FEM_PARTY_PROFITABILITY | Profitability              |
| CACC3                     | FEM_PARTY_PROFITABILITY | Profitability              |
| CACC4                     | FEM_PARTY_PROFITABILITY | Profitability              |
| CACC5                     | FEM_PARTY_PROFITABILITY | Profitability              |
| CONTRIB_AFTER_CPTL_CHG    | FEM_PARTY_PROFITABILITY | Profitability              |
| EXPENSE_TOTAL             | FEM_PARTY_PROFITABILITY | Profitability              |
| EXPENSE1                  | FEM_PARTY_PROFITABILITY | Profitability              |
| EXPENSE2                  | FEM_PARTY_PROFITABILITY | Profitability              |
| EXPENSE3                  | FEM_PARTY_PROFITABILITY | Profitability              |
| EXPENSE4                  | FEM_PARTY_PROFITABILITY | Profitability              |

**Table F-2 Data Source Attributes (Cont.)**

| <b>Attribute</b>     | <b>Source</b>           | <b>Data Source Name(s)</b> |
|----------------------|-------------------------|----------------------------|
| EXPENSE5             | FEM_PARTY_PROFITABILITY | Profitability              |
| ISO_CURRENCY_CD      | FEM_PARTY_PROFITABILITY | Profitability              |
| LTD1                 | FEM_PARTY_PROFITABILITY | Profitability              |
| LTD2                 | FEM_PARTY_PROFITABILITY | Profitability              |
| LTD3                 | FEM_PARTY_PROFITABILITY | Profitability              |
| LTD4                 | FEM_PARTY_PROFITABILITY | Profitability              |
| LTD5                 | FEM_PARTY_PROFITABILITY | Profitability              |
| PARTNER_VALUE_INDEX  | FEM_PARTY_PROFITABILITY | Profitability              |
| PARTY_ID             | FEM_PARTY_PROFITABILITY | Profitability              |
| PROFIT               | FEM_PARTY_PROFITABILITY | Profitability              |
| PROFIT_PCT           | FEM_PARTY_PROFITABILITY | Profitability              |
| PROFIT_TOTAL         | FEM_PARTY_PROFITABILITY | Profitability              |
| PROFIT1              | FEM_PARTY_PROFITABILITY | Profitability              |
| PROFIT2              | FEM_PARTY_PROFITABILITY | Profitability              |
| PROFIT3              | FEM_PARTY_PROFITABILITY | Profitability              |
| PROFIT4              | FEM_PARTY_PROFITABILITY | Profitability              |
| PROFIT5              | FEM_PARTY_PROFITABILITY | Profitability              |
| RATIO1               | FEM_PARTY_PROFITABILITY | Profitability              |
| RATIO2               | FEM_PARTY_PROFITABILITY | Profitability              |
| RATIO3               | FEM_PARTY_PROFITABILITY | Profitability              |
| RATIO4               | FEM_PARTY_PROFITABILITY | Profitability              |
| RATIO5               | FEM_PARTY_PROFITABILITY | Profitability              |
| RELATIONSHIP_EXPENSE | FEM_PARTY_PROFITABILITY | Profitability              |
| REVENUE_TOTAL        | FEM_PARTY_PROFITABILITY | Profitability              |
| REVENUE1             | FEM_PARTY_PROFITABILITY | Profitability              |
| REVENUE2             | FEM_PARTY_PROFITABILITY | Profitability              |
| REVENUE3             | FEM_PARTY_PROFITABILITY | Profitability              |

**Table F–2 Data Source Attributes (Cont.)**

| <b>Attribute</b>      | <b>Source</b>           | <b>Data Source Name(s)</b> |
|-----------------------|-------------------------|----------------------------|
| REVENUE4              | FEM_PARTY_PROFITABILITY | Profitability              |
| REVENUE5              | FEM_PARTY_PROFITABILITY | Profitability              |
| TOTAL_EQUITY          | FEM_PARTY_PROFITABILITY | Profitability              |
| TOTAL_GROSS_CONTRIB   | FEM_PARTY_PROFITABILITY | Profitability              |
| TOTAL_ROE             | FEM_PARTY_PROFITABILITY | Profitability              |
| TRANSACTION1          | FEM_PARTY_PROFITABILITY | Profitability              |
| TRANSACTION2          | FEM_PARTY_PROFITABILITY | Profitability              |
| TRANSACTION3          | FEM_PARTY_PROFITABILITY | Profitability              |
| TRANSACTION4          | FEM_PARTY_PROFITABILITY | Profitability              |
| TRANSACTION5          | FEM_PARTY_PROFITABILITY | Profitability              |
| VALUE1                | FEM_PARTY_PROFITABILITY | Profitability              |
| VALUE2                | FEM_PARTY_PROFITABILITY | Profitability              |
| VALUE3                | FEM_PARTY_PROFITABILITY | Profitability              |
| VALUE4                | FEM_PARTY_PROFITABILITY | Profitability              |
| VALUE5                | FEM_PARTY_PROFITABILITY | Profitability              |
| YTD1                  | FEM_PARTY_PROFITABILITY | Profitability              |
| YTD2                  | FEM_PARTY_PROFITABILITY | Profitability              |
| YTD3                  | FEM_PARTY_PROFITABILITY | Profitability              |
| YTD4                  | FEM_PARTY_PROFITABILITY | Profitability              |
| YTD5                  | FEM_PARTY_PROFITABILITY | Profitability              |
| CUSTOMER_ID           | AS_ACCESSES_ALL         | Sales Access               |
| GROUP_ID              | JTF_RS_GROUPS_VL        | Sales Access               |
| GROUP_NAME            | JTF_RS_GROUPS_VL        | Sales Access               |
| RESOURCE_ID           | JTF_RS_RESOURCE_EXTNS   | Sales Access               |
| SALESFORCE_ID         | AS_ACCESSES_ALL         | Sales Access               |
| ORIG_SYSTEM           | HZ_ORIG_SYS_REFERENCES  | System Reference           |
| ORIG_SYSTEM_REFERENCE | HZ_ORIG_SYS_REFERENCES  | System Reference           |

**Table F–2   Data Source Attributes (Cont.)**

| Attribute        | Source                 | Data Source Name(s) |
|------------------|------------------------|---------------------|
| OWNER_TABLE_ID   | HZ_ORIG_SYS_REFERENCES | System Reference    |
| OWNER_TABLE_NAME | HZ_ORIG_SYS_REFERENCES | System Reference    |
| STATUS           | HZ_ORIG_SYS_REFERENCES | System Reference    |





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