



Siebel Marketing User Guide

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1

What's New in This Release

What's New in Siebel Marketing User Guide, Version 7.8, Rev. A

Table 1 lists changes described in this version of the documentation to support release 7.8 of the software.

Table 1. What's New in Siebel Marketing User Guide, Version 7.8, Rev. A

Topic	Description
Managing the catalog Read Managing the Catalog on page 36	Added information on how to manage the catalog.
Refreshing display Read Refreshing the Display on page 37	Added information on how to refresh the display of segments and segment trees.
Reloading server metadata Read Reloading Server Metadata on page 37	Added information on how to reload server metadata to reflect the most recent metadata changes.
Results sets Read Saving Result Sets for Marketing Segments on page 43	Added information on requirements. Added information on saving results sets for segment trees. Added information on purging results sets.
Segment advanced options Read Segment Advanced Options on page 45	Added information on new controls.
Segment Designer Read About Segment Designer on page 33	Added information on features available on the start page.
Segment extension attributes Read Segment Extension Attributes on page 46	Added information on the new extension attributes feature for segments.
Segment tree advanced options Read Segment Tree Advanced Options on page 55	Added information on new controls.

What's New in This Release ■

Table 1. What's New in Siebel Marketing User Guide, Version 7.8, Rev. A

Topic	Description
Selection rules for segment trees Read Adding Selection Rules to a Segment Tree on page 50	Added information on using the Selection Rules tab for segments trees.
Selection rules for segments Read Adding Selection Rules on page 40	Added information on using the Selection Rules tab for segments.

NOTE: In addition to the content-based changes listed in [Table 2](#), this entire book has been revised to match the new documentation model.

Table 2. What's New in Siebel Marketing User Guide, Version 7.8

Topic	Description
Contact Call offers Read Contact Call Offers on page 106	Added information on contact call offers for users of Oracle's Siebel Pharma Marketing and Siebel Pharma Campaigns.
Enhanced adding contacts and prospects Read Adding Contacts and Prospects to Campaigns Individually on page 156 .	Revised the procedure.
Enhanced deleting lists. Read Deactivating or Deleting Lists on page 203 .	Added a procedure on deleting lists and a procedure on deactivating lists.
Enhanced executing programs. Read Executing Programs on page 69 .	Added a procedure on executing programs.
Enhanced procedures for viewing charts. Read Displaying Campaign Charts in Siebel Campaigns on page 170 and Process of Displaying Response Charts in Siebel Campaigns on page 175 .	Added a list of procedure heading for viewing charts topics.
Loyalty Programs Read About Loyalty Programs on page 31 .	Added information about associating loyalty programs with campaigns. For users of Siebel Loyalty Management only.
Marketing Plans and Budget Process Read Process of Creating Marketing Plans and Budget Requests on page 19 .	Added this process to clarify the steps to create a marketing plan and a budget request.
Marketing Program Design Process Read Process of Designing Marketing Programs on page 57 .	Added a process to clarify the steps to design marketing programs.

Table 2. What's New in Siebel Marketing User Guide, Version 7.8

Topic	Description
New HTML editor Read Using the HTML Editor on page 85 .	Added information on the new features of the HTML Editor.
Process flow Read Marketing Process Flow on page 15 .	Added new chapter on the process of constructing and executing campaigns and programs.
Relocated topics Read About Associating Web Offers, Web Surveys, Events, and URLs with Offers on page 104 , and Associating Web Offers, Web Surveys, Events, and URLs with Offers on page 105 .	Moved these topics to a new location in the chapter for easier access and understanding.
Specialized Offers Read Creating Other Offer Types on page 106 .	Created a new topic that contains offers for specific specialized needs.
Waves for stand-alone campaigns Read Using Waves with Campaigns on page 159 .	Stand-alone campaigns can now include waves, and have hour-based lags.
Wireless offers Read Wireless Offers on page 109 .	Added information about wireless offers.

2

Marketing Process Flow

Siebel Marketing helps you automate, design, and target marketing campaigns and programs. A marketing program can be complex, involving multiple stages, some that can recur automatically and can trigger new stages based on customer responses. For simpler needs, you can use a stand-alone campaign.

This chapter includes the following sections:

- [About Campaigns](#)
- [Executing Campaigns from Start to Finish on page 17](#)

About Campaigns

A campaign is a marketing tool to target and motivate specific segments of your customer base to achieve a specific result. Campaigns can be stand-alone or part of a multistage program. Stand-alone campaigns include the elements listed in [Table 3](#).

Table 3. Elements in Stand-Alone Campaigns and Multistage Campaigns

Element	Description
Offer	<p><i>Offers</i> are a way to present content on product and services to current and potential customers as part of a campaign. Offers are associated with a campaign, and then presented to contacts and prospects when the campaign is launched. Offers can be reused in many campaigns, but the campaign is a one-time instance of the offer presented to a customer at a certain point in time.</p> <p>Offers associated with campaigns are created using the Offers screen. Typically each campaign has a single offer, but you can associate multiple offers with one campaign. For example, a single campaign may have email and Web offer treatments. For more information, read Creating and Using Offers on page 71.</p>
Segment	<p>A segment defines a target set of customers or prospects. A campaign can target one or more segments. For more information, read Marketing Segments and Segment Trees on page 33.</p>

Table 3. Elements in Stand-Alone Campaigns and Multistage Campaigns

Element	Description
Source code	A source code is composed of multiple codes that represent information about the customer, and the offer sent to the customer, so that you can track the customers' responses and gauge the reaction to a campaign and its offers. An administrator creates the source code definitions for you. For more information, read <i>Siebel Marketing Installation and Administration Guide</i> .
Vendor	A vendor is a company that you retain to help you in a campaign, such as printing house, a fulfillment house, and a telemarketer. An administrator enters the vendor information for you. For more information, read <i>Siebel Marketing Installation and Administration Guide</i> .

For campaigns that are more complex than a stand-alone campaign, there are additional elements for planning, organizing, and targeting. Complex campaigns have multiple stages in which contacts in the first stage receive follow-up treatment in the program's second and third stages, often based on the contact's response to the original campaign. For more information, read [About Multistage Programs on page 58](#). Tab lists elements found in multistage campaigns.

Table 4. Elements Used Only in Multistage Campaigns

Element	Description
Marketing Plans	Marketing plans provide support for planning and budgeting across the marketing organization. Using marketing plans, marketing executives and managers can create high-level business plans that cover a broad set of tactics, including outbound and inbound programs, campaigns, and events. For each plan, the marketing executive or team can set goals and objectives, identify available funds, assign budgets, associate multichannel marketing tactics, share documents, and generate forecasts. For more information about marketing plans, read Planning and Budgeting for Marketing on page 19 .
Programs	A program is a container for organizing, designing, and executing multistage, triggered, and recurring marketing programs using new or existing campaigns, lists, and segments. You can establish multiple stages for a marketing program. Each stage can have multiple campaigns, lists, segments, and segment trees. Subsequent stages can be based on a customer response or any other event. For example, a visit by a sales person to a premium customer may trigger a follow-up email to that customer for the selected product. For more information, read Designing Marketing Programs on page 57 .

Table 4. Elements Used Only in Multistage Campaigns

Element	Description
Responses	Response handling is essential in triggering follow-up stages. Whenever prospects or contacts respond to an offer through any channel (by inbound email, the Web, a call center, or sales representative, and so on), their responses may be captured in detail. You can use this data to determine which contacts to pursue as opportunities. For more information, read About Using Response Management on page 143 .
Waves	Waves are a method of phasing the delivery of a campaign or stage over time. For example, you want to extend an offer to millions of customers, but do not want to add more inbound call center staff to handle the load. Using waves, you can phase the delivery of offers over any time delay (in hours or days) you need. For more information, read Setting Up Waves for Campaign Loads on page 65 .

Executing Campaigns from Start to Finish

The approach for executing campaigns depends on if you are executing a stand-alone campaign or a marketing program (multistage campaigns):

- [Executing Stand-Alone Campaigns from Start to Finish on page 17](#)
- [Executing Marketing Programs from Start to Finish on page 17](#)

Executing Stand-Alone Campaigns from Start to Finish

To execute a stand-alone campaign you need to complete the following elements:

- 1 Segments. Read [Marketing Segments and Segment Trees on page 33](#).
- 2 Offers. Read [Creating and Using Offers on page 71](#).
- 3 Campaigns. Read [Planning and Designing Marketing Campaigns on page 113](#).
- 4 (Optional) Waves. Read [Setting Up Waves for Campaign Loads on page 65](#).
- 5 Launch campaign. Read [Process of Launching Campaigns on page 164](#).

Executing Marketing Programs from Start to Finish

To execute a marketing program, you need to complete the following elements:

- 1 (Optional) Marketing Plan. Read [Planning and Budgeting for Marketing on page 19](#).
- 2 Marketing Program. Read [Designing Marketing Programs on page 57](#).
- 3 Segments. Read [Marketing Segments and Segment Trees on page 33](#).
- 4 Offers. Read [Creating and Using Offers on page 71](#).

- 5 Response Handling. Read [About Using Response Management](#) on page 143.
- 6 (Optional) Waves. Read [Setting Up Waves for Campaign Loads](#) on page 65.
- 7 Launch program. Read [Launching Programs and Campaigns](#) on page 163.

3

Planning and Budgeting for Marketing

Siebel Marketing provides support for planning and budgeting across the marketing organization.

This chapter contains the following sections:

- [About Planning and Budgeting for Marketing on page 19](#)
- [Process of Creating Marketing Plans and Budget Requests on page 19](#)
- [Creating and Submitting Budget Requests on page 29](#)
- [About Loyalty Programs on page 31](#)

About Planning and Budgeting for Marketing

Siebel Marketing provides support for planning and budgeting across the marketing organization. Using marketing plans, marketing executives and managers can create high-level business plans that cover a broad set of tactics, including outbound and inbound programs, campaigns, and events. For each plan, the marketing executive or team can set goals and objectives, identify available funds, assign budgets, associate multichannel marketing tactics, share documents, and generate forecasts.

The Marketing Planning module can be applied to fit any organizational planning approach, including plans based on time periods (such as quarterly or annual planning cycles), business units, product lines, or any other management structure. Plans can be organized in hierarchies with any number of levels to support small marketing organizations as well as more complex planning processes.

Executives can also set high-level corporate objectives and then assign goals to each business unit that is participating in the plan. Each business unit can then create its marketing plan to meet its own assigned goals, forecast the organization's ability to achieve the assigned goals, and submit the plan for approval. Based on common goals and performance metrics, marketing organizations can develop their own set of key performance metrics and institute the use of those metrics across their marketing plans.

Process of Creating Marketing Plans and Budget Requests

To create marketing plans and budget requests, perform the following tasks:

- [Creating Marketing Plans on page 20](#)
- [Setting Goals for Marketing Plans on page 21](#)
- [Creating Plan Tactics and Associating Plan Tactics with Marketing Plans on page 23](#)
- [Developing and Tracking Budgets for Marketing Plans on page 25](#)

- [Associating Fund Requests with Marketing Plans on page 26](#)
- [Attaching Documents to Marketing Plans on page 26](#)
- [Adding Expenses for Events, Campaigns, and Programs on page 26](#)
- [Associating Invoices and Invoice Items with Expenses on page 28](#)
- [Using the Marketing Plan Explorer on page 28](#)

Related Topic

- [About Developing and Tracking Budgets for Marketing Plans on page 24](#)

Creating Marketing Plans

You create a marketing plan in the Marketing Plans screen. The Marketing Plans list provides a list of the marketing plans to which you have access.

The visibility filter provides several levels of visibility, including the following views:

- My Marketing Plans displays marketing plans with which you are associated as a team member.
- All Marketing Plans displays marketing plans in your assigned organizations.
- All Marketing Plans across My Organizations displays marketing plans that exist in your organizations and in any suborganizations in your organizations.
- All Marketing Plans across Organizations displays the marketing plans that exist in every organization in your application.

To create a marketing plan

- 1 Navigate to the Marketing Plans screen.
- 2 In the Marketing Plans list, create a new record.
- 3 Complete the fields, using [Table 5](#) as a guide.

Table 5. Marketing Plans Fields

Field	Description
Marketing Plan Name	(Required) The name of the marketing plan.
Plan Code	(Required) An identification code provided by you. Must be a unique value.
Type	(Optional) A list of the category types of marketing plans. Examples of possible values include Corporate, Regional, Business Unit, and Department.
Objective	(Optional) A text description of the objective of the marketing plan.

Table 5. Marketing Plans Fields

Field	Description
Planning Period	(Optional) You associate the planning period with the plan so that you can use it during categorization and reporting. For example, you may need to track a quarterly or annual planning period.
Execution Period	(Optional) The period in which the plan is to be executed.
Approval Status	A status field that indicates that the plan has been Approved, Declined, Submitted, or Needs Revision.
Approval History	Displays the history of approvals for the budget request.
Region	(Optional) A listing of regions that you can associate with this plan. Regions are organized using a region hierarchy.
Organization	(Optional) A multivalue field displaying organizations associated with the plan. Organizations that appear in this list have visibility to the plan.
Team	(Optional) A multivalue field containing members of the team for the plan.

Setting Goals for Marketing Plans

Each marketing plan can be associated with a set of goals. Each goal is a metric against which the performance of the plan is measured.

To create a goal for a marketing plan

- 1 Navigate to the Marketing Plans screen.
- 2 In the Marketing Plans list, click a plan name.
- 3 In the Marketing Plans form, use the Type drop-down list to choose a type of plan.
- 4 Click the Goals view tab.
- 5 In the Goals list, click Apply Goal Template.

The goals from the template populate the Goals list.

NOTE: If a template is not available, a message appears indicating that there is no active goals template for the specified type that you chose in [Step 3](#).

- 6 If a goal template is not available, in the Goals list, create a new record.

7 In the new record, complete the fields using [Table 6](#) as a guide.

NOTE: Make sure that you select the appropriate number format for the goal type.

Table 6. Fields for Marketing Plan Goals

Field	Description
Metric	<p>Type of goal. The following are some of the values for this field:</p> <ul style="list-style-type: none"> ■ Average Cost per Lead. (Number Format=Currency) The expected cost of the marketing activities in the plan divided by the number of sales leads generated. ■ Average Cost per Opportunity. (Number Format=Currency) The expected cost of the marketing activities in the plan divided by the number of sales opportunities generated. ■ Average Cost per Order. (Number Format=Currency) The expected cost of the marketing activities in the plan divided by the number of sales orders generated. ■ # Leads. (Number Format=Integer) The number of sales leads this plan is expected to yield. The definition of lead may vary based on your company's business process. ■ ROI %. (Number Format=Percentage) The Return on Investment percentage that this plan is expected to earn. ■ Unit Volume. (Number Format=Integer) The number of product units that are expected to be sold as a result of this plan.
Number Format	<p>The types of formats are Number (nonfinancial), Percentage (nonfinancial), and Currency (financial).</p> <ul style="list-style-type: none"> ■ If you select the Currency number format (a financial goal), complete the Target Amount field. ■ If you select a different number format (a nonfinancial goal), in the Target Qty field, enter the target number for the goal. <p>NOTE: If the goal has a Number Format of Percentage be sure to enter whole number values, not decimal values. For example, an ROI goal of 15% should be entered as "15", not ".15".</p>
Forecast Amount or Forecast Quantity	<p>If you know the expected forecast value, enter it in the Forecast Amount or Forecast Quantity field. If you do not know the expected forecast value, leave the Forecast Amount or Forecast Quantity field empty, and add the value after you develop a forecast.</p>

Creating Plan Tactics and Associating Plan Tactics with Marketing Plans

A plan tactic is a marketing program, event plan, or stand-alone campaign that you have associated with a marketing plan. A marketing plan can be associated with any number of marketing programs, event plans, or stand-alone campaigns:

- A marketing program is any program created in the Programs screen.
- An event plan can be any event plan created in the Events screen.
- A stand-alone campaign can be any campaign created in the Campaigns screen that is not associated with a marketing program.

You can create new tactics while developing your marketing plan or associate existing tactics with the marketing plan.

To create a new plan tactic and associate it with a marketing plan

- 1 Navigate to the Marketing Plans screen.
- 2 In the Marketing Plans list, click a marketing plan name.
- 3 Click the Plan Tactics view tab.
- 4 In the Plan Tactics list, create a new tactic.
- 5 In the new tactic record, complete the Tactic Name and Type fields.

CAUTION: Be sure to select the correct Tactic Type (Event Plan, Program, or Standalone Campaign) before saving the record, because the type cannot be changed after the record is saved.

To associate an existing plan tactic with a marketing plan

- 1 Navigate to the Marketing Plans screen.
- 2 In the Marketing Plans list, click a marketing plan name.
- 3 Click the Plan Tactics view tab.
- 4 In the Plan Tactics list, click Add.
You can modify every fields in this record except Type.
- 5 In the Pick Tactic dialog box, query for an event, program, or stand-alone campaign, and click OK.

NOTE: Each tactic can be associated with only one marketing plan.

About Developing and Tracking Budgets for Marketing Plans

You can use marketing plans to develop budgets. As you implement tactics, you can track the financial status of the marketing plan. A marketing plan contains financial details that provide visibility across your company's marketing spending. The following list includes some of the financial details you may want to use:

- Authors of the plan can add the expected cost of the plan and owners of the budget can allocate money to the plan.
- An associated group of budget requests so that tactic owners can send requests for funding through an approval process.
- A list of tactics, including their requested and allocated budgets, can be associated with the plan.
- Financial summary fields can calculate the forecast and actual revenue and expenses for the tactics in the plan.

Use the marketing plan to review and approve budgets, to forecast expenses and revenues, and to record actual expenses and revenues for the campaigns, events, and programs in your organization. The marketing plan provides the following categories of values for managing marketing budgets:

- **Requested and Assigned Budget.** The Plan Tactics view tab contains two fields that show how much money the plan owner has requested (Requested Budget) and how much money has been approved by the budget owner (Assigned Budget). These fields can be edited.
- **Forecast and Actual Expenses.** The total forecast and actual expenses across tactics in the marketing plan.
 - Forecast Expenses. Total forecast expense value for expense records associated with the tactics (programs, campaigns, and events) in the marketing plan.
 - Actual Expenses. Total actual expense value for expense records associated with the tactics in the marketing plan.

Table 7 identifies the location of expense data for each type of tactic.

Table 7. Expense Source Fields (Forecast and Actual)

Tactic Type	Where to Find the Input Data
Event Plans	Events screen > Event Plans > Plan > Expenses
Events	Events screen > Plan > Expenses
Programs	Programs screen > Plan > Expenses Campaigns screen > Plan > Expenses (for campaigns associated to programs)
Standalone Campaigns	Campaigns screen > Plan > Expenses

- **Forecast and Actual Revenue.** The total actual expenses and revenues across tactics in the marketing plan. The Plan Details view tab includes a Financial Summary section summarizing total revenues for the tactics in the plan.

Table 8 identifies the location of revenue data for each type of tactic.

Table 8. Revenue Goals Source Fields (Forecast and Actual)

Tactic Type	Where to Find the Input Data
Campaigns	Campaigns screen > Plan view tab > Goals link
Event Plans	Events screen > Event Plans link > Plans view tab > Revenue link
Programs	Programs screen > Plan view tab > Goals link

- **Forecast Revenue.** A total of forecast values for revenue goals such as forecast amount for tactics in the marketing plan.
- **Actual Revenue.** The Total Order Revenue for orders associated with a tactic using values obtained from the Siebel Analytics Server after the Siebel Data Warehouse is populated from the Siebel transactional database. If the value from the Analytics Server is not integrated into your environment, the value is blank.

Developing and Tracking Budgets for Marketing Plans

You can use marketing plans to develop budgets. As you implement tactics, you can track the financial status of the marketing plan.

To assign requested and assigned budgets to marketing plan tactics

- 1 Navigate to the Marketing Plans screen.
- 2 In the Marketing Plans list, click a marketing plan.
- 3 Click the Plan Tactics view tab, and verify that you have associated your targeted programs, events, and stand-alone campaigns.

For more information on associating plan tactics, read [Creating Plan Tactics and Associating Plan Tactics with Marketing Plans on page 23](#).

- 4 If the columns for Assigned Budget and Requested Budget are not visible in the list, then make them visible.
 - a From the Plan Tactics Menu, choose Columns Displayed.
 - b In the Columns Displayed dialog box, move Assigned Budget and Requested Budget to the Selected Columns list and click Save.
- 5 In the appropriate column, enter the assigned or requested or amount.

If you developed forecast expenses for the tactic, you can verify the plan is within budget by comparing your assigned budget to the forecast expenses.

Associating Fund Requests with Marketing Plans

If your company uses the Market Development Funds module (MDF), any fund request can be associated with a plan tactic. For more information about creating fund requests, read the section about fund requests in *Siebel Partner Relationship Management Administration Guide*.

To associate a fund request with a marketing tactic, each fund request needs a link to the Marketing Purpose field in the request. After you associate fund requests with a tactic, the total value of the associated fund requests appears in the Total Funds field in the Marketing Plan form.

To associate a fund request with a marketing plan

- 1 Navigate to the Fund Requests screen.
- 2 In the Fund Requests list, select the fund request, and then click the Marketing Purpose select button.

To display the Marketing Purpose field, you may need to click the menu button, choose Columns Displayed, and add the column.
- 3 In the Pick Source dialog box, select the marketing tactic (program, campaign or event) that you want to associate with the fund request.

Attaching Documents to Marketing Plans

You can attach planning documents to a marketing plan using the Documents view. These documents are visible to anyone who has access to the plan.

To attach a document to a marketing plan

- 1 Navigate to the Marketing Plans screen.
- 2 In the Marketing Plans list, click a Marketing Plan name.
- 3 Click the Documents view tab, and attach the document to the marketing plan in either of the following ways:
 - If the document is a file on your computer or network, click New File, then navigate to the file, and click Open.
 - If the document is a Web page, click New URL, paste the URL into the URL field, and click Add.

Adding Expenses for Events, Campaigns, and Programs

Using the Expense views for event plans, events, campaigns, and programs you can add the type and amount for each budget expense along with information, such as the purchase order number and invoice details. After you add expenses, the total forecast and actual values are calculated and displayed in the parent marketing plan for the tactic.

To add expenses for a campaign, event, event plan, or program

- 1 Use one of the following steps.
- 2 Navigate to the appropriate screen for your product:
 - For campaigns, navigate to the Campaign Management screen.
 - For events, navigate to the Events screen > Events view.
 - For event plans, navigate to the Events screen > Event Plan view.
 - For programs, navigate to the Programs screen.
- 3 In the list, click a campaign, event, event plan, or program name.
- 4 Click the Plan view tab.
- 5 In the Plan link bar, click Expenses.
- 6 Create a new record, and complete the fields.
- 7 (Optional) For programs only, associate the expense to a specific campaign by choosing the campaign in the Campaign Name field, if appropriate.

Table 9 on page 27 contains descriptions of some of the fields available.

Table 9. Expense Fields for Campaigns, Events, Event Plans, and Programs

Field	Description
Expense (Campaigns and Programs only)	A reference name for the expense.
Campaign Name (Programs only)	A reference name for the campaign.
Purpose (Campaigns and Programs) Cost Type (Events and Event Plans)	The category for the expense.
Unit (Campaigns and Programs only)	Indicates if the expense is a fixed or unit (variable) cost.
Invoice Id#	The Id that corresponds to the invoice received. This information is available only if your company stores invoice information in the application. For more information, read Associating Invoices and Invoice Items with Expenses on page 28 .
Assigned Budget (Campaigns only)	The amount budgeted for the expense.
Forecast # Units, Forecast Unit Cost, and Forecast Expense	Typically, the Forecast amount indicates the expected cost of the expense before the actual quote or invoice is received for the expense. The Forecast Expense column is calculated by multiplying Forecast # Units by Forecast Unit Cost.

Table 9. Expense Fields for Campaigns, Events, Event Plans, and Programs

Field	Description
Actual # Units, Actual Unit Cost, and Actual Expense	Typically, the Actual amount indicates the true cost of the expense after the quote or invoice is received. The Actual Expense column is calculated by multiplying Actual # Units by Actual Unit Cost.
Variance	Calculated as Actual Expense less Forecast Expense.
Event (Event Plans only)	Associates the expense with a specific event.
Session (Events and Event Plans only)	Associates the expense with a specific session.
Expense Date	Determines the correct exchange rate, if your application spans multiple currencies.

Associating Invoices and Invoice Items with Expenses

Invoice values are available only if your company stores invoice information in the application.

To associate invoices and invoice items with expenses

- 1 Navigate to the Campaigns, Events, or Programs screen.
- 2 Click the campaign, event, event plan, or program name.
- 3 Click the Plan view tab.
- 4 In the Plan link bar, click Expenses.
- 5 In the Expenses list, locate the expense record to associate the invoice and Invoice item.
- 6 Click the Invoice Id # select button, query for the invoice number, and click OK.
NOTE: Only Invoices with a type of Payable appear.
- 7 Scroll down to the Invoice Line Items list, and click Add.
- 8 In the Pick Line Items dialog box, select one or more line items to associate with the expense.
- 9 Click Update Actual Cost to update the Actual Expense field on the expense record.
NOTE: You can associate different line items from the same invoice to different expense records.

Using the Marketing Plan Explorer

To review the organization of your marketing plans and its associated budget requests and plan tactics, use the Plan Explorer.

To use the Plan Explorer

- 1 Navigate to the Marketing Plans screen > Plan Explorer view.
- 2 Expand the Marketing Plans folder.
- 3 To display budget requests associated with a marketing plan, expand a budget requests folder in the parent plan folder.
- 4 To display plan tactics associated with a marketing plan, expand a plan tactics folder in the parent plan folder.

Creating and Submitting Budget Requests

Use budget requests to request money to pay for a marketing activity such as a campaign, event, or program. You can specify the amount of funding you need, associate the tactics related to the request, and submit the request for approval from the budget owner in your organization. Budget requests can be associated with a marketing plan or created and approved without establishing a relationship to a marketing plan.

To create a budget request

- 1 Navigate to the Marketing Plans screen.
- 2 In the Marketing Plans link bar, click Budget Requests.
- 3 In the Budget Requests list, create anew record, and complete the fields using [Table 10 on page 29](#) as a guide.
- 4 To associate campaigns, or event plans programs, with a budget request, select the Plan Tactics view tab, and click Add.

Table 10. Budget Request Fields

Field	Action
Total Requested	Total amount of the budget request. This field must be completed, or the budget request cannot be submitted.
Approval Status	A status field that indicates that the plan has been Approved, Declined, Submitted, or Needs Revision.
Marketing Plan	Associates the request with the marketing plan.
MDF Requested	Calculated by totaling the MDF Requests associated with any tactics in the budget request.
Approval History	Displays the history of approvals for the budget request.
Planning Period	Indicates the time period during which the request is active. For example, an annual or quarterly budgeting period.

Table 10. Budget Request Fields

Field	Action
Budget Category (G/L Account)	Choose a budget category for the request. The categories typically correspond to the values in the back-office accounting general ledger.
Net Requested	Calculated by subtracting the MDF Requested from the Total Requested.
Approved Budget	Specify the amount of money approved for the request. This field should be used only by employees with budget authority.
Region	Select the region authorized to spend the funds.
Type	The value corresponds to the categories that your organization uses to organize and review requests.
Line Number	You can use this field in any way that meets your business needs. For example, some general ledger applications generate a line number for each budget item.
Organization	Associates the request with organizations that should have visibility to the request.
Pre-Approved	Indicates if approval has already been provided. When you check the preapproval flag, the value in the Approval Status field is prefilled with Approved.
Delivery Date	The date that the funds need to be available.
Team	Select the employee positions that should have visibility to the request.
Brand	The Brand (category) related to the tactics for the request.
Product Lines	The product lines related to the request.
Products	The products related to the request.
Target Industry	The target industry for the tactics in the request.
Market Development Funds	Select an MDF Fund to indicate the source of any MDF Requests to be associated with tactics for the request. This relationship does not limit any associations between MDF Request and the tactics.
Actual Total Expense	The calculated total of expenses from the tactics associated with the budget request.
Actual MDF Received	The calculated total of MDF Requests associated with the budget request tactics.

After you create the budget request (making sure that the Total Requested field is complete), submit the budget request.

NOTE: Be sure that the marketing plan for the budget request is associated with a tactic before submitting the request. For instructions, read [Creating Plan Tactics and Associating Plan Tactics with Marketing Plans on page 23](#).

To submit a budget request

- 1 From the Approval Status drop-down list, choose Submitted.
The Pick Employee dialog box opens.
- 2 In the Pick Employee dialog box, select the employee to whom you want to submit the budget request.
- 3 (Optional) Add a comment to the request.

To approve or decline a budget request

- 1 Navigate to the My Approvals Inbox view.
- 2 Click the budget request name.
The Marketing Plans > Budget Request view appears.
- 3 In the Approval Status drop-down menu, choose Approved, Declined, or Needs Revision.
The Pick Employee dialog box opens.
- 4 In the Pick Employee dialog box, select the employee who submitted the budget request.
- 5 (Optional) Add a comment to the request.

To associate a budget request with a marketing plan

- 1 Navigate to the Marketing Plans screen
- 2 In the link bar, click Plan Explorer.
- 3 In the Marketing Plans list, expand a Marketing Plan name.
- 4 Click the Budget Requests folder.
- 5 In the Budget Requests list, click Add.
- 6 In the Pick Budget Request dialog box, select the budget request, and click OK.

NOTE: If there are any tactics associated with the budget request that are not already associated with a marketing plan, the tactics are then associated with the marketing plan.

About Loyalty Programs

Loyalty programs are available in Siebel Loyalty Management only.

You can associate a campaign to your loyalty promotions by first associating the loyalty program with a marketing plan. Any expenses for the loyalty promotion are then rolled up to the marketing plan and appear in the audit trail.

To associate a loyalty program with a marketing plan

- 1 Navigate to the Marketing Plans screen.
- 2 Click a marketing plan.
The Plan Tactics view tab appears.
- 3 Click the Plan Details tab.
- 4 In the Marketing Plan Details form, choose a Loyalty Program.

To associate a loyalty promotion with a campaign

- 1 Navigate to the Marketing Plans screen.
- 2 Click a marketing plan.
The Plan Tactics view tab appears.
- 3 Add a new plan tactic.
- 4 Click the plan tactic.
- 5 Click the Design view tab.
- 6 Click the Related Loyalty Promotions link.
Siebel Marketing displays a list of Loyalty programs that are associated with the selected Marketing plan.
- 7 Add a promotion.

4

Marketing Segments and Segment Trees

You can use Siebel Marketing to develop target segments for marketing campaigns. From the segmentation home pages, you can perform the following tasks:

- **Create a segment.** A segment defines a target set of customers or prospects. In most cases, the members of a segment change over time because the criteria are reevaluated against the most current data in your database.
- **Create a segment tree.** Use a segment tree to select one or more segments and split the segment members into smaller groups (or target cells).
- **Create a List format.** List Formats define the layout of files that you can use for purposes such as mailing to postal addresses or email addresses.
- **Manage marketing jobs.** The Manage Marketing Jobs link on the segmentation home pages displays your jobs and cache entries. The administrator can display job and cache entries for every user. For more information about managing marketing jobs, read *Siebel Marketing Installation and Administration Guide*.

This chapter contains the following sections:

- [About Segment Designer on page 33](#)
- [About Segment Tree Designer on page 46](#)
- [Creating and Editing Segment Trees on page 47](#)

About Segment Designer

The Segment Designer determines how many prospects or customers qualify for a series of criteria. Each Segment is created by adding a sequence of successive criteria blocks to refine the segment membership. With each additional criteria block that you add, the membership can either increase or decrease depending on whether the criteria excluded or added members. You can create a new segment, you can click the new icon or open a saved segment, modify it, and save it with a new name.

Each segment is based on a target level that indicates the type of customer you plan to count and target for your campaigns. For example, target levels may include companies, individuals, or households.

For each target level there are a set of relevant subject areas that contain the information about that target level. These subject areas organize available facts and attributes into common topics such as Campaign History, Orders, Products Owned, or Service History.

From the start page for the Segment designer, you can do the following:

- **Open a Saved Segment.** To open an existing segment, drill down on the segment folders in the left column.

- Create a New Segment. To create a new segment, select a target level from the list of target levels.
- Manage Marketing Jobs. To view the status of jobs that are processed by the server, click the link.

For additional information, read the following topics:

- [Frequently Used Terms for Marketing Segmentation on page 34](#)
- [Managing the Catalog on page 36](#)
- [Refreshing the Display on page 37](#)
- [Reloading Server Metadata on page 37](#)
- [Creating Segments in Segment Designer on page 37](#)
- [Adding Criteria Blocks to Segments on page 38](#)
- [Saving Result Sets for Marketing Segments on page 43](#)
- [Segment Advanced Options on page 45](#)

Frequently Used Terms for Marketing Segmentation

Table 11 defines frequently used segment and segment tree terms.

Table 11. Frequently Used Terms for Marketing Segmentation

Term	Description
Criteria Block	Building block of a segment. With each additional criteria block that you add, the membership can either increase or decrease.
Cumulative Count	A type of count computed by the Segment Designer. The cumulative count represents the total number of segment members that qualify for the indicated criteria block as well as the criteria blocks above it. As you add an additional criteria block at the bottom of the stack, the cumulative count either increases or decreases depending on whether you add, keep, or exclude segment members from the previous result.
Deduplication	Calculation that removes overlapping members of a segment tree branch. Overlapping members are members of one branch that also qualify for any higher priority branch.
Eligible Audience	A set of criteria that constrain the members of a segment tree. The eligible audience appears in the top section of the segment tree. The Eligible Audience criteria are defined by selecting a segment with the criteria and then adding the segment to the Eligible Audience section of the Segment Tree. For example, you may have an eligible audience which excludes inactive customers or only selects customers in your geographic region.
Global Audience	A default eligible audience set by an administrator to apply to every segment and segment tree.

Table 11. Frequently Used Terms for Marketing Segmentation

Term	Description
Gross Count	<p>In a segment, gross count represents the total number of members that qualify for a specific criteria block, independent of any other criteria block in the segment design. This value tells you how many segment members would be selected if the specific criteria block was the only criterion in your segment.</p> <p>In a segment tree, the gross count represents the total number of members that qualify for a tree branch, taking into account the full set of criteria in the parent branches.</p>
Groups	<p>A group is a combined set of criteria blocks that evaluate together. A group is like a pair of parentheses in an equation, so that the qualifying members for the group are determined before adding or removing the group members from the cumulative segment membership.</p>
List format	<p>Define the layout of files that you can export for a variety of purposes such as importing targeted customers into a campaign, building a customer email list, or generating a list for execution by a third-party vendor.</p>
Nested Segment	<p>A segment that is embedded within another segment definition. When a nested segment is used, its corresponding counts apply the criteria for the nested segment and then add, keep, or exclude the qualifying customers to the cumulative count for the main segment.</p>
Net Count	<p>A type of count computed by the Segment Tree Designer. The net count represents the number of members that qualify for a target cell in the segment tree. The net count displays how many members qualify based on the splitting and sampling criteria. Net count displays the members after deduplication.</p>
Not Included Count	<p>A type of count computed by the Segment Tree Designer. The Not Included Count represents the number of members that were removed from a tree branch because they also qualified for any higher priority cell.</p>
Priority	<p>Each target cell has an assigned priority number, which is used to apply deduplication when some members qualify for more than one target cell. Priority must be an integer value of 1 or higher and no two cells can share the same priority. The smallest value in the tree (usually 1) is the top priority.</p>
Saved Result Set	<p>A fixed set of segment members that are recorded at a particular point in time. They are saved in the database so that they can be reused in the future without reevaluating the criteria again.</p>

Table 11. Frequently Used Terms for Marketing Segmentation

Term	Description
Segment	A target set of customers or prospects that qualify for a set of criteria. In most cases, the exact members of a segment changes over time because the criteria are reevaluated against the most current data in your database. However, using saved result sets, you can also save a segment as a static set of customers that were recorded at a particular point in time.
Segment Tree	Use to select one or more segments and split the segment members into smaller groups (or target cells). As you split a segment into smaller groups, the groups are displayed in a tree diagram. As in segments, segment trees can save a static set of customers derived from any target cell.
Splitting and Sampling	The action you take to break a segment or segment tree branch into smaller groups.
Subject Area	A set of facts and dimensions that are organized by a common topic, such as Orders, Products Owned, Service History, or Campaign History. Within each subject area, you can choose any fact or dimensional attribute to create a criteria for your segment.
Target Cells	An end point branch of a segment tree, meaning that the branch does not have any child branches. Target Cells are the only branches that can be associated with a marketing campaign. Target Cells have an assigned priority number, and you can use deduplication to deduplicate members that qualify for more than one target cell.
Target Level	Indicates what type of customer are counted in the segment membership and included in associated campaigns. For example, target levels may include target levels, companies, individuals, or households. The gross and cumulative counts for a segment are counted based at the selected target level. In most situations, target levels represent some type of customer, such as an individual or company. However, target levels can also be created by your administrator to create more advanced segment definitions. For example, advanced target levels can include Assets or Products that a customer owns.
Web Catalog	The Siebel Analytics Web Catalog stores content created with the Segment Designer, Segment Tree Designer, and List Format designer. Content can be organized into folders, which are either shared or private. Types of content that can be stored in the Web Catalog include segments, segment trees, list formats, as well as reports, filters, and dashboards created with Siebel Answers.

Managing the Catalog

Use the Manage Catalog feature to edit, rename, set permissions for, and delete folders and items in the Siebel Analytics Web Catalog. To manage the catalog, click the Manage Catalog link in the Segments or Segment Trees column.

For more information on managing the catalog, read *Siebel Analytics Web Administration Guide* or access the online help from the Manage Catalog window.

Refreshing the Display

The Segments column and Segment Trees column is populated when you first access the Segments or Segment Tree Designers. New folders, segments, and segment trees added by other users during your session do not automatically appear in your session. To keep your display current so you can access any new items, click Refresh Display at the bottom of the column.

Reloading Server Metadata

When creating a segment you use columns that are created in Siebel Analytics. The list of columns available to you is populated when you start the Segment Designer, and is not automatically updated during your session. To update the list of columns, click Reload Server Metadata at the bottom of the Segments column.

Creating Segments in Segment Designer

The Segment Designer applies criteria blocks in a top-down sequence so that each criteria block that you add refines the segment membership of the criteria immediately above it. As you add criteria vertically down the screen, the Cumulative Count keeps track of how many customers have qualified for that criteria and those above it. At the bottom of the view, the total count of qualifying segment members appears with the criteria applied.

NOTE: The Segment Designer computes two types of counts, gross count and cumulative count. For descriptions, read [Frequently Used Terms for Marketing Segmentation on page 34](#).

For special situations where you need to create a group of criteria blocks (similar to parentheses in an equation), you can drag one criteria block on top of another to create a group. This method applies a combined set of criteria as a single constraint on the main segment membership.

The Segment Designer can include a reference to another existing segment (referred to as a nested segment) within the segment you are building.

After you create a segment, you can save it in one of the folders in the Web Catalog.

To create a new nested segment based on a different target level, click the Select Another Target Level button. This action saves the current segment. You can then build a nested segment and return to the main segment when you are finished.

NOTE: The subject areas that you can display are dependent on the security settings specified for you by your site's administrator.

About Using the Marketing Segment Panel to Add Criteria to Segments

Use the segment selection pane to add criteria blocks when creating new or changing existing segments. To create a new segment, you can click the new icon or open a saved segment, modify it, and save it with a new name. Using either method, you select the subject area and field to use for a segment criteria. The panel displays the subject areas that are relevant for the target level for your segment.

You can also add a nested segment to your segment by selecting a folder displayed in the bottom of panel and clicking the segment name.

Adding Criteria Blocks to Segments

Each criteria block denotes a set of criteria that are evaluated together. This means that any segment member that qualifies for the criteria block must meet the criteria displayed within the block.

For example, if a segment has the following criteria block:

```
Product purchased is a blue hat
AND
Purchase date is December 31, 2004
```

This segment finds the customers who purchased a blue hat on December 31, 2004. Because the criteria are in the same block, the criteria are applied to the lowest level dimension related to the criteria, which, in this case, is Purchases (record-level evaluation).

If your segment places criteria into separate criteria blocks, each criteria block finds segment members that satisfy each criteria block. After segment members have been identified, the segment designer determines how many segment members qualified for both criteria blocks.

NOTE: If your administrator sets up a dashboard so you can display the contacts that qualify, you can display this dashboard by clicking the final segment count (at the bottom of the screen).

For example, you may have a segment with the two criteria blocks shown in the following list:

Start With	Criteria block 1: Product purchased is a blue hat.
Keep	Criteria block 2: Purchase date is December 31, 2004.

In this example, the relationship between the criteria are evaluated at the customer level, rather than the purchase level (record level). This segment would find the customers who purchased a blue hat at any time and customers who purchased any product on December 31, 2004. For example, the segment includes customers who purchased a blue hat in February and purchased a black coat on December 31, 2004.

To select a field to add as a criteria block

- 1 Click a subject area near the top of the selection pane and then expand the subfolders to display the available facts and dimensions.
- 2 Click the fact or dimension to use.

- 3 In the Create/Edit Filter dialog box, add the filter criteria, and click OK.
For more information, read the topic about using column filters in *Siebel Analytics User Guide*.

To set properties for a criteria block

- 1 In a criteria block, click Properties.
- 2 In the Properties dialog box, make changes to any of the following options:
 - In the Label field, enter a custom caption for your criteria.
 - Cache the block for future update counts requests.
Select this option to temporarily cache the results for that criteria block. This option saves time when refreshing counts while designing a segment. When a block is cached, updating counts refreshes the cache when the cache is expired or does not exist. By default, the segment designer does not cache any blocks unless you explicitly check this box.
- 3 Click OK.

To add filters to a criteria block

- 1 In a criteria block, click the filter button.
- 2 In the Create/Edit Filter dialog box, add the filter criteria.
For more information, read the topic "About Using Column Filters" in *Siebel Analytics User Guide*.
- 3 When you are finished adding filters for the criteria block, click OK.

To add a filter using an aggregate field

- 1 Create a new criteria block or click the filter button on an existing block.
- 2 Select the aggregate field such as Order Revenue from the selection pane.
- 3 To group by another field, in the Create/Edit filter dialog box, click Add Aggregate By.
- 4 While the Add Aggregate By dialog box is open, in the selection pane, click a field to group the results by.

To embed a nested segment in your segment design

- 1 Click the My Segments or Shared Segments folder at the bottom of the selection pane.
- 2 Click a segment to add as a nested segment.

To save a new segment

- 1 Click the save icon in the upper-right corner of the screen.
- 2 Select a folder location where the segment is to be saved.
- 3 Enter a segment name, and click OK.

To save changes to a segment

- 1 Click the save icon in the upper-right corner of the screen and click OK.
- 2 In the Save dialog box, click Yes to confirm replacing the previous version.

To generate lists

- 1 Save the segment.
- 2 Click Generate List

To view the cumulative counts within a criteria block

- 1 Click the filter button on the criteria block.
- 2 In the Edit Criteria Block dialog box, click Get Counts.
- 3 The cumulative counts for each criterion in the criteria block appears.
NOTE: The starting count for the selected block is based on the cumulative count for the criteria block above your selected block.
- 4 When you are finished viewing the counts, click Back to Editing, and click OK.

To update counts in a segment

- 1 In the upper-right of the Edit Segment tab, click Update Counts.
- 2 In the Update Counts dialog box, select a refresh option.
- 3 If you are using the Cache option, you can also select Refresh Cache.
Selecting Refresh Cache guarantees that you query against the most current data.
- 4 Click OK.

Adding Selection Rules

Selection Rules control the items related to the segment that are included in the campaign load and list export processes. For example, for a segment of accounts (companies), you can control which employee or employees at the company you want to target.

A selection rule consists of several parts:

- Inclusion and Exclusion criteria - Apply one or more criteria to indicate what items are to be included in and excluded from the segment.
- Ranking rule - If there are multiple items related to each segment member, use the ranking rule to indicate how the items should be ranked. For example, if there are multiple employees for an account, indicate what field you want to use to rank the employees before selecting a subset.
- Record count selector - Indicate whether you want to select one or more items for each segment member (the Target Level). For example, you can indicate how many employees from a single company should be targeted.

You can apply selection rules for more than one qualified item if desired. For example, you may have a segment targeted at households that own a variety of financial assets (bank account, insurance policy, or mortgage). You could use a selection rule for individuals to control which member of the household to which to communicate and a second selection rule on assets that controls which assets to mention in the text of a personalized letter.

NOTE: Selection rules for any nested segments within another segment definition are ignored. Only selection rules for the top-level segment are applied.

To create a selection rule

- 1 Click on Add Selection Rule.
- 2 Select the type of Qualified Item to constrain or select.
- 3 In the Create/Edit Filter dialog box, add the filter criteria.
For details, read the topic about using column filters in Siebel Analytics User Guide. Alternatively, you can filter the item with an existing saved segment by clicking the segment from the left panel.
- 4 Click OK.
- 5 In the criteria block, select Include/Exclude to indicate whether to include or exclude these types of items from the results.
- 6 For additional constraints, repeat the previous step as needed.
- 7 In the bottom section of the rule, use the option buttons to select whether all items qualify or only specific items.
For more information on selecting specific items, read [To add a ranking rule to a selection rule](#).

To add constraints to a selection rule

- 1 Click on Add Another Constraint.
- 2 In the Create/Edit Filter dialog box, add the filter criteria.
- 3 For details, read the topic about using column filters in Siebel Analytics User Guide.
- 4 Click OK.
- 5 In the criteria block, select the Include/Exclude link to indicate whether to include or exclude these types of items from the results.

To add a ranking rule to a selection rule

- 1 In the area beneath the constraint criteria boxes, select the option button for a limited number of items (for example, 1 Contact only).
The Add Ranking Field link appears.
- 2 Select the link.

- 3 In the dialog box, select a field from the left hand selection pane to use for the ranking, and then click OK.
- 4 In the drop-down list choose either Maximum or Minimum for selecting items in the ranking field.

NOTE: Date fields treat older dates as Minimum and newer dates as Maximum.

- 5 To modify the formula for the ranking field or add a Case statement, click the Edit Formula icon.
For more information, read [To modify the formula for the Ranking Field](#).

NOTE: Ranking fields are available from any subject area that relates to both the Qualified Item and the main segment's primary Qualified Item (the Target Level).

To modify the formula for the Ranking Field

- 1 In the Ranking line for the Selection Rule, click the Edit Formula icon.
- 2 In the dialog box, click the Column Formula tab.
- 3 To display a glossary of available expressions, click the help link.
- 4 To convert the values for a field using a Case statement, click the Bins tab.
- 5 To create a bin for a condition, click Add Bin.

NOTE: By default, bin values are treated alphabetically. In the Bins tab, you may need to treat the resulting values as numeric values (to use numeric sorting). For example, if you used Bins to convert the Net Worth field to Values 1,2,3...10, you would want to rank numerically to make sure that '10' was after '9'. To enable numeric ranking, click the check box for 'Treat result as a numeric value or expression'.

- 6 When done editing, click OK.

As a shortcut, you can add a criteria block from the Edit Segment view directly as a Selection Rule constraint. You can only reuse criteria blocks from the top level of the segment criteria and blocks that use Keep and Exclude operators.

To reuse criteria from the Edit Segment view as a selection rule constraint

- 1 Click the Edit Segment tab.
- 2 Locate the criteria block to which to add selection rules and click its view icon.
The Properties dialog box appears.
- 3 Check the box for the Qualified Item to constrain.
- 4 Click OK.
- 5 Click the Selection Rules tab.
The constraint has been added to the selection rule for the item you checked.

Saving Result Sets for Marketing Segments

A Saved Result Set is a fixed set of segment members that are recorded at a particular point in time. They are saved in the database so that they can be reused in the future without evaluating the criteria again.

Saved Result Sets can be useful in the following situations:

- When you want to freeze the members of a segment at a specific point in time, so that the membership does not change.
- When you have a very complex segment and you want to store the members of a recently counted segment to save query time.
- When you want to save a branch of a segment tree as a separate segment.

Requirements

Before you can save a result set, you must create a result set list format and specify that list format in the Advanced Options. For more information on creating a result set list format, read the chapter on Designing Marketing List Formats in *Siebel Marketing Installation and Administration Guide*. For more information on specifying which list format to use for your segment, read "[Segment Advanced Options](#)" on page 45.

To save a result set for a Marketing segment

- 1 In the Segment Designer, open the segment.
- 2 Click the Saved Result Sets tab.
- 3 Click the Save Result Set button.
- 4 In the Please save your current segment dialog box, verify segment name and location.
- 5 Click OK to submit the job.
- 6 To cancel the job, click the Cancel/Exit links.

After the request is complete, the newly created saved result set appears.

To use a segment saved result set as a nested segment

- 1 In the Segment Designer, open a segment to edit.
- 2 Find a different saved segment in the Segment Folders in the selection pane and click it to add it to the segment design.
- 3 Click the properties button on the nested segment block.
- 4 Select Use Saved Result Set.
- 5 In the Saved Result Sets dialog box, select one of the following:
 - Always use most recent Saved Result Set
 - Choose a specific result set from the list.

- 6 Click OK to close the Saved Results Set dialog box.
- 7 Click OK to close the Properties dialog box.
- 8 Save your changes.

To set a segment to always use a Saved Result Set

- 1 In the Segment Designer, open the segment.
- 2 Click the Advanced Options tab.
- 3 Select the following check box, and then click OK:
Always use most recent saved result set

NOTE: When you use this segment, the most recent result set determines the segment membership.

To save the results set for an entire segment tree

- 1 Click the Saved Result Sets tab.
- 2 Click Save Results Set.
- 3 In the Please save your current segment dialog box, verify segment name and location.
- 4 Click OK.
- 5 When prompted, enter a custom label for the segment tree.

Marketing creates a static segment for each tree node. The naming format is:
<Custom Label>-<Node Label>-<Priority>

While Saving a result set for a particular tree node, you have the option of either append to an already created static segment (useful for doing analysis over time) or creating a new static segment.

To purge a saved result set

- 1 Click the Saved Result Sets tab.
- 2 Select a results set and check its box.
- 3 Click Purge.

Results sets for branches are listed twice: once as part of the tree and once as a static segment. Purging one instance purges both.

Segment Advanced Options

Table 12 shows the options available in the Advanced Options tab for a segment.

Table 12. Segment Advanced Options

Control Name	Description
Cache final segment result set for list output	When generating multiple lists based on the same segment, you can cache the final set of customers during the first list usage so that subsequent list uses can access those results for faster processing.
Always use most recent Saved Result Set	When you use the segment, the most recent result set determines the segment membership.
Default to cache criteria blocks for future jobs	Controls the default value of the check box named Cache this block for future Update Counts.
Campaign Load File format	<p>The campaign load file format used for loading the members of the segment tree into each campaign.</p> <p>The campaign load file format controls what information about the segment members is loaded into the campaign history in the Siebel Marketing transactional database. This information may include name, address, and email address.</p> <p>When you first create a segment, the Campaign Load file format is set based on the default setting for the target level. You can select a different file format, if required. If you are not certain about the effect of changing the file format, contact your administrator.</p> <p>For more information on list formats, read the chapter on Designing Marketing List Formats in <i>Siebel Marketing Installation and Administration Guide</i>.</p>
List Preview File Format	<p>The file that specified the format used for previewing lists.</p> <p>For more information on list formats, read the chapter on Designing Marketing List Formats in <i>Siebel Marketing Installation and Administration Guide</i>.</p>
Saved Result Set File Format	<p>The file that specified the format used for saved results sets.</p> <p>For more information on list formats, read the chapter on Designing Marketing List Formats in <i>Siebel Marketing Installation and Administration Guide</i>.</p>

Table 12. Segment Advanced Options

Control Name	Description
Segment Extension Attributes	For more information, read the topic on "Segment Extension Attributes" below.
Purge List Cache (button)	Clicking this button submits a job to purge the cache entries associated with pulling a list requalified by any of the target cells in this tree. You would click this button prior to pulling a list to make sure that the list contains the most recent customers in the target cell.

Segment Extension Attributes

Segment Extension Attributes are additional columns you add to a segment or a segment tree node. These attributes do not affect the segment counts. Instead, they are used to provide a means of storing additional data for each customer in a segment. This additional data can be used in list generation and in third party tools for further analysis. Your administrator creates the list of columns available for use as extension attributes.

Example: You add two extension attributes to a segment. One extension attribute is a column that contains the source of a new lead (trade show, internet web page visit, cold call) and the other column contains the product the lead is interested in. Based on the source and product information, you can track the resulting sales to see if lead source affects product sales.

To add an extension attribute

- 1 In the Advanced Options tab, click Add Attribute.
The Segment Extension Attributes window appears.
- 2 Select an attribute.
The new attribute appears in the Advanced Option tab's Segment Extension Attributes list.
- 3 In the Value column, enter an alphanumeric value.

About Segment Tree Designer

Using the Segment Tree Designer, you can create a new segment tree or open a saved segment tree by selecting it in the selection pane, making changes, and saving the tree under the same or a new name. After you create a segment tree, you can save it in one of the folders in the Web Catalog in the selection pane. To obtain descriptions for frequently used terms, read [Frequently Used Terms for Marketing Segmentation on page 34](#).

The Segment Tree Designer has links to additional Help information on each screen. When you need more information, click the Help link in the dialog box or the small help icon next to the item.

Creating and Editing Segment Trees

The Segment Tree Designer creates and edits segment trees. You can select one or more segments and split the members into smaller groups (or target cells). As you split a segment into smaller groups, the groups are displayed in a tree diagram, and the resulting branch is always the same size or smaller than the parent branch.

Use the Split/Sample option to split any segment or tree branch into smaller groups. You can select from a set of splitting and sampling methods, including Random selection, Nth selection, Ranked, N-tiles, and Values.

NOTE: For more information about adding a filter using an aggregate field, read [Adding Criteria Blocks to Segments on page 38](#).

Each segment tree is based on a target level, which indicates what type of customer you plan to count in the tree. For example, target levels can include target levels, companies, individuals, or households. When deduplication is enforced between target cells in the tree, the deduplication is applied at the target level. For example, if the target level for the tree is Companies, then deduplication makes sure that each company is a member of only one cell.

As you split and sample from the tree branches, some of the branches are end point branches, meaning that they do not have any child splits. These end points are referred to as *Target Cells*, because they are the distinct groups targeted in a marketing program. Each Target Cell displays a priority number. The priority is used to apply deduplication between cells that may contain some of the same members.

The Segment Tree Designer displays several types of counts such as net counts and gross counts. For descriptions, read [Frequently Used Terms for Marketing Segmentation on page 34](#).

Members of the Segment Tree are constrained by the eligible audience. The eligible audience is a set of criteria that appear in the top section of the screen. The criteria are applied to the Eligible Audience by creating a segment with the criteria and then adding the segment to the Eligible Audience section of the Segment Tree. For example, you may have an eligible audience which excludes inactive customers or only selects customers in your geographic region. Optionally, your administrator can also designate a Global Audience, which is a set of criteria that applies to the segment trees and cannot be removed by other users.

After you create a segment tree, you can save it in one of the folders in the Web Catalog.

The Segment Tree Designer has links to additional Help information on each screen. When you need more information, click the Help link in the dialog box or the small help icon next to the item.

This section contains the following topics:

- [Creating a Segment Tree in Segment Tree Designer on page 48](#)
- [About Segment Tree Branch Properties on page 49](#)
- [Adding Selection Rules to a Segment Tree on page 50](#)
- [Splitting Segments or Branches on page 51](#)
- [Constraining List Data for a Segment Tree on page 54](#)
- [Adding or Removing Constraints to the Eligible Audience on page 54](#)

Creating a Segment Tree in Segment Tree Designer

Use the segment tree selection pane to create a new segment tree, select the segments to sample in the tree, and select the fields to use for the splitting criteria. After you create a segment tree, you can save it in one of the folders in the Web Catalog.

When you begin editing a tree, the selection pane displays the available segments that you can use in the tree. To add a segment to the segment tree, open its folder in the selection pane, and click the segment name.

As you add splitting and sampling criteria, the selection pane changes to display the available subject areas and fields for the target level on which the tree is based.

NOTE: The subject areas that you can display depend on the security settings specified for you by your site's Administrator.

To create a new segment tree

- 1 In the Segment Tree Designer, select a Target Level.
- 2 In the selection pane, click the names of the segments to add.
- 3 To save the segment tree, click the save icon in the upper-right corner of the screen.
- 4 Select the folder location where the segment tree is to be saved.
- 5 Enter a segment tree name and click OK.

To add a segment to a segment tree

- 1 In the Segment Tree Designer, select the Edit Segment tab.
- 2 Click the folder in the selection pane to display the segments.
- 3 Click the segment name in the selection pane.
This adds the segment to the bottom of the segment tree.
- 4 Click the save icon in the upper-right corner of the screen and click OK.
- 5 Click Yes in the dialog box to confirm saving over the previous version.

To generate lists for a node

- 1 Save the segment tree.
- 2 Select a node.
- 3 Click the node's menu button and choose Generate Lists.

To update counts in a segment tree

- 1 In the upper-right of the Edit Segment Tree tab, click Update Counts.
The Update Counts window opens.

- 2 In the Update Counts dialog box, click the Count Options tab.
- 3 Indicate which criteria blocks to update:
 - New and changed criteria blocks
 - Selected criteria blocks
 - All criteria blocks
- 4 If you are using the Cache option, you can also select Refresh Cache.
Selecting Refresh Cache guarantees that you query against the most current data.
- 5 Click the Count Type tab.
- 6 Select the counts to be updated—making sure to select at least one type of count—and then click OK.

About Segment Tree Branch Properties

Table 13 shows the options available in the properties dialog box for a segment tree branch.

Table 13. Segment Tree Branch Properties

Control Name	Description
Label	Used to add a custom label for the branch. NOTE: Custom labels cannot be entered for embedded segment nodes.
Include Remainder with child cells (check box)	When selected, adds a remainder group when you split or sample the branch.
Include overlapping members from higher priority cells	When selected, disables deduplication for this cell.
Cache this block for future Update Counts	Select this option for the following reasons: <ul style="list-style-type: none"> ■ When selected, this option temporarily caches the members who qualified for that branch, which saves when time refreshing counts while designing a segment tree. ■ When a split-by-value node is marked for caching and constrains a secondary list attribute, this attribute is also cached. ■ The segment tree designer caches the tree nodes by default.
Anticipated response rate for statistical significance test	Use this to add the assumed response rate for that cell.

Table 13. Segment Tree Branch Properties

Control Name	Description
Save Result Set (button)	Saves the list of members that qualify for the branch based on the most recent updated counts. When you click this button, you are prompted for a new segment name. The customers in the target cell are extracted and saved to the new segment. NOTE: The saved segment does not include any of the original criteria, it includes only the stored list of members.
Path	This displays the Web catalog path of the segment to which an embedded segment node refers.
Use Saved Result Set	When selected for an embedded segment node, you can select the following options: <ul style="list-style-type: none"> ■ Always use most recent Saved Result Set. ■ Choose a specific result set from the list.

Adding Selection Rules to a Segment Tree

Selection Rules control the items related to the segment tree cells that are included in the campaign load and list export processes. For example, for a segment tree of accounts (companies), you can control which employee or employees at the company you want to target.

For a Segment Tree, you have several options to apply the Selection Rules:

- **Selection Rules tab.** Use this tab to enter explicit Selection Rules that should apply to all cells on the Segment Tree.
- **Inherit Selection Rules from the segments.** This option inherits any existing selection rules from the segment or segments included in the segment tree.
- **Apply constraints from the Segment Tree splitting and sampling criteria.** Use this option to selectively apply the criteria for specific tree branches as part of the selection rule.

For information on creating selection rules, read [Adding Selection Rules](#).

Rather than create Selection Rules for the entire segment tree, you can inherit the Selection Rules from each segment.

To inherit selection rules from a segment

- 1 Click the view icon for the segment in the tree.
- 2 Click Properties.

The Properties dialog box appears.

- 3 Check the box for Inherit Selection Rules from the segment and then click OK.

NOTE: The inherited rules do not appear in the Selection Rules view. This occurs because the criteria may vary between different segments in the tree, while the Selection Rules view shows only criteria that apply to all cells in the tree. You can only inherit selection rules from segments with the same target level as the tree.

As a shortcut, you can add the splitting and sampling criteria from the Edit Segment Tree view directly as a Selection Rule constraint.

To reuse criteria from the Edit Segment Tree view as a selection rule constraint

- 1 Click the Edit Segment Tree tab.
- 2 Locate the split block to be added to the selection rules and click its icon.
The Properties dialog box appears.

- 3 Check the box for the Qualified Item to constrain, and then click OK.

NOTE: These constraints do not appear in the Selection Rules view. This occurs because the criteria may vary between different tree branches, while the Selection Rules view only shows criteria that apply to all cells in the tree.

Splitting Segments or Branches

Use the Split/Sample option to split any segment or tree branch into smaller groups. As you split or sample, the resulting branch is always the same size or smaller than the parent branch. [Table 14](#) shows the available sampling methods.

Table 14. Sampling Methods for Splitting Segments

Sampling Method	Description
Random selection	The Random method selects a purely random subset of members based on the percentage or count you add for this method. For random selection, you are not required to select a field.
Nth selection	The Nth method splits the branch into N number of equally sized groups. The selection is based on the sequence with which the records are returned from the database. For example, if you select N = 4, the branch would be split into 4 equally sized groups representing 25% of the original group. For this method, you are not required to select a field.
Ranked	The Ranked method sorts the members of the branch by a field you select and lets you choose the top or bottom portion of the ranked list. For example, if you Rank by Total Customer Revenue, you can select the top 10% of the customers with the highest revenue.

Table 14. Sampling Methods for Splitting Segments

Sampling Method	Description
N-tiles	The N-tile method sorts the members by a field you select and then splits the list into equal sized groups. For example, you may create quartets or deciles based on Total Customer Revenue.
Values	Similar to instructions for creating filters in segment criteria blocks. For more information about adding a filter using an aggregate field, read Adding Criteria Blocks to Segments on page 38 .

Mixing Random Splits with Other Splits

You can create segments that mix random splits with other splits. However, this affects how targets are assigned to each split. Random splits exclude targets only when those targets are in immediately adjacent random splits. This point is best illustrated by some examples.

Example A: Three Random Splits

- 1 - Random Split 10%
 - 2 - Random Split 20% (This split excludes targets that are in split 1.)
 - 3 - Random Split 30% (This split excludes targets that are in splits 1 and 2.)
- Effect: All three splits contain different targets, no target exists in more than one split.

Example B: Mixed Random and Nth Splits with Possible Recurrence of Targets

- 1 - Random Split 10%
 - 2 - Nth Split [N=10]
 - 3 - Random Split 20% (This split does not exclude any targets.)
 - 4 - Random Split 30% (This split excludes targets that are in split 3, but does not exclude targets that are in other splits.)
- Effect: Because Split 4, a random split, follows another random split, it does not contain any targets that are in split 3. Because there is a nonrandom split after split 1, targets from split 1 could appear in splits 3 and 4.

Example C: Mixed Random and Nth Splits with No Recurrence of Targets in Random Split

- 1- Nth Split [N=10]
 - 2- Random Split 10%
 - 3- Random Split 20% (This split excludes targets that are in split 2.)
 - 4- Random Split 30% (This split excludes targets that are in splits 2 and 3.)
- Effect: Because the random splits are adjacent to each other, splits 3 and 4 exclude any targets that are in previously adjacent random splits. However, targets in split 1, an Nth split, may recur in any of the random splits.

When random split cells are separated, they are evaluated independently and do not stay mutually exclusive.

To select a field for splitting or sampling criteria

- 1 Click the action button for a tree branch to split or sample.
- 2 In the menu, choose Split/Sample.
- 3 In the Apply Split/Sample dialog box, select a sampling method to use.

NOTE: The contents of the dialog box changes when you select different sampling methods.

The available subject areas and fields appear in the selection pane. The list of subject areas is based on the target level for the segment tree.

- 4 In the revised Apply Split/Sample dialog box, complete the fields.
- 5 Click the subject area that contains the desired field.
- 6 Click the folders to expand the subject area.
- 7 Click the field name.

To create random samples

- 1 Enter the number of groups to create (1 to N).
- 2 Select whether to define the group sizes by Percentage or Count.
- 3 Enter a percentage or count for each group, and click OK.

The sum of the percentages cannot exceed 100%.

To create Nth samples

- 1 Enter the number of groups to create (N).
- 2 Click OK.

To create ranked samples

- 1 Select the field to rank by from a subject area in the selection pane.
- 2 Enter the number of groups to create (1 to N).
- 3 Select whether to define the group sizes by Percentage or Count.
- 4 Enter a percentage or count for each group, and click OK.

The sum of the percentages cannot exceed 100%.

To create N-tile samples

- 1 Select the field to use for the N-tile from a subject area in the selection pane.
- 2 Enter the number of groups to create (1 to N).
- 3 Select whether the top group has the lowest or highest values for the selected field, and click OK.

Using the Values Sampling Method

Instructions for creating Values samples uses instructions that are similar to creating filters in segment criteria block. For more information about adding a filter using an aggregate field, read [Adding Criteria Blocks to Segments on page 38](#).

Constraining List Data for a Segment Tree

This option can limit the information in list files to members of the branch. For example, if you have a segment tree based on accounts, you may qualify specific contacts for the accounts based on criteria for that branch.

Additionally, this option can limit the information in list files to any additional items that you constrained on the segment tree branch. The following are scenarios for other types of constraints:

- **Nested Segment Node.** You may have a business-to-business company targeting business accounts. You split by predefined contact segments containing the decision-making contact at each account. You can make sure that you select the correct contact for each account by constraining the contact attribute for the nested segment node.
- **Split-by-Value Node.** You may have a banking company targeting customers split by checking and savings account types. You can make sure that you select the correct account type for each customer by constraining the bank account attribute for the split-by-value node.

You can constrain list data for a tree branch only when the following criteria are met:

- The branch is an embedded segment node in which the target level is different from the target level of the segment tree.
- The branch is a split node created using the values sampling method, and the split-by field is not an aggregated measure.

To constrain list data for a segment tree

- 1 In the Segment Tree Designer, locate the branch on which you want to constrain data.
You can only constrain list data on nested segment tree nodes and split by value nodes.
- 2 Click the Actions button, and choose Constrain List Data from the menu.
- 3 In the dialog box, select a qualified item to constrain.
- 4 In the Constrain List Data dialog box, click OK.

Adding or Removing Constraints to the Eligible Audience

Members of the Segment Tree are constrained by the Eligible Audience. The eligible audience is a set of criteria that appear in the top section of the screen. The criteria are applied to the Eligible Audience by creating a segment with the constraining criteria and then adding the segment to the Eligible Audience section of the Segment Tree. For example, you may have an eligible audience that excludes inactive customers or only selects customers in your geographic region.

Optionally, your administrator can also designate a Global Audience, which is a set of criteria that applies to every segment tree and cannot be removed by other users. The Global Audience appears as a block that is more lightly shaded than the rest of the tree. For instructions about setting the Global Audience, read *Siebel Marketing Installation and Administration Guide*.

To add or remove constraints to the Eligible Audience

- 1 Click the actions button on the existing eligible audience block.
- 2 To add constraints, choose Add Constraint and perform the following steps:
 - a In the Add additional constraints to the Eligible Audience dialog box, click Browse.
 - b Select the segment that has the criteria to use to constrain the audience.
- 3 To remove constraints from the eligible audience, click the delete button on the constraint to be removed.

NOTE: If the constraint is the Global Audience, you cannot remove it.
- 4 Click OK.

Segment Tree Advanced Options

Table 15 shows the options available in the Advanced Options tab for a segment tree.

Table 15. Segment Tree Advanced Options

Control Name	Description
Cache final segment result set for list output	When generating multiple lists based on the same segment, you can cache the final set of customers during the first list usage so that subsequent list uses can access those results for faster processing.
Automatically create remainder cells	If you do not want the tree designer to create remainders whenever you split a branch, clear this option.
Default to include overlapping members from higher priority cells in lower priority cells	The standard behavior for new trees is to always enforce deduplication between target cells. When this option is checked, deduplication is not enforced for the segment tree. However, you can enable deduplication for specific branches using the branch properties.
Default to cache tree blocks for future jobs	Controls the default value of the check box named Cache this block for future Update Counts (in the properties of a newly created tree branch).

Table 15. Segment Tree Advanced Options

Control Name	Description
Campaign Load File format	<p>The campaign load file format used for loading the members of the segment tree into each campaign.</p> <p>The campaign load file format controls what information about the segment tree members is loaded into the campaign history in the Siebel Marketing transactional database. This information may include name, address, and email address.</p> <p>When you first create a segment, the Campaign Load file format is set based on the default setting for the target level. You can select a different file format, if required. If you are not certain about the effect of changing the file format, contact your administrator.</p>
List Preview File Format	The file that specified the format used for previewing lists.
Saved Result Set File Format	The file that specified the format used for saved results sets.
Statistical Significance Parameters	<p>The following variables are used as inputs for the statistical significance calculation:</p> <ul style="list-style-type: none"> ■ Confidence interval ■ Error tolerance, plus or minus ■ Default Response Rate
Purge List Cache (button)	Clicking this button submits a job to purge the cache entries associated with pulling a list requalified by any of the target cells in this tree. You would click this button prior to pulling a list to make sure that the list contains the most recent customers in the target cell.

5

Designing Marketing Programs

In the Programs screen, you can use the Program Flow view or the Program Explorer view to design and execute programs using new or existing segments, lists, and campaigns.

This chapter contains the following sections:

- [About Designing Marketing Programs on page 57](#)
- [Process of Designing Marketing Programs on page 57](#)
- [About Multistage Programs on page 58](#)
- [About the Program Execution Workflow on page 59](#)
- [Creating Programs on page 59](#)
- [About Using the Program Flow on page 62](#)

About Designing Marketing Programs

A *program* is a multistep dialogue in which you can set up a series of communications to your customers and prospects. In the Programs screen, you can use the graphical drag-and-drop Program Flow view or the Program Explorer view to design and execute multistage, triggered, and recurring marketing programs using new or existing campaigns, lists, and segments.

You can establish multiple stages for a marketing program. Each stage can have multiple campaigns, lists, segments, and segment trees. Subsequent stages can be based on a customer response or any other event. For example, a visit by a sales person to a premium customer may trigger a follow-up email to that customer for the selected product.

In the workspace, you can use the right-click menu to manually start Marketing Server tasks. To schedule server tasks to be started automatically, use the Schedule calendar.

The graphical Program Flow designer is integrated with the workflow engine and Marketing Server. Therefore, when defined, the entire program can be automated from the initial customer segmentation through communication, to response collection and analysis. This capability is especially useful when programs are set to recur, such as a monthly welcome package campaign to new customers.

Process of Designing Marketing Programs

To design marketing programs, perform the following tasks:

- [Creating Programs on page 59](#)
- [Adding Stages to Programs on page 63](#)

- [Using Repeating Stages Within Programs on page 63](#)
- [Assigning Segments to Stages on page 64](#)
- [Adding Campaigns to Stages on page 64](#)
- [Setting Up Waves for Campaign Loads on page 65](#)
- [Adding Imported or Internal Lists to Campaigns on page 67](#)
- [Adding Trees to Stages and Allocating Segment Tree Cells on page 67](#)
- [Creating and Applying Program Templates on page 68](#)
- [Executing Programs on page 69](#)

Related Topics

- [About Multistage Programs on page 58](#)
- [About the Program Execution Workflow on page 59](#)
- [About Using the Program Flow on page 62](#)
- [Process of Loading Customers in Campaigns on page 153](#)
- [Launching Programs and Campaigns on page 163](#)

About Multistage Programs

Siebel Marketing supports both single-stage and multistage marketing programs. In a single-stage program, contacts are targeted in a stand-alone campaign, with no follow-up campaigns planned. During a multistage program, contacts in the first stage receive follow-up treatment in the program's second and third stages, often based on the contact's response to the original campaign. Multistage programs use stages to mark each phase of the program, campaigns to track separate instances of marketing messages, and campaign waves to track each batch of customers that are contacted. The following are types of multistage programs:

- **Marketing program with recurring campaign.** Scheduled to recur at standard intervals or specific times (daily, weekly, monthly, quarterly, yearly). For example, your company sends out a welcome kit and free gift to new customers on a monthly basis. Each month, a program stage occurs, new customers are identified (based on the segment criteria of account longevity of less than a month), and the welcome campaign is launched.
- **Event-triggered marketing program.** Provides a follow-up activity based on an action. For example, a customer visiting a product catalog may trigger an email offer to that customer based on items included in the customer's cart. If no response to the email is received, a telesales campaign launches to offer the customer a special offer on the product.

- **Response triggered marketing program.** Uses response data to drive the next stage of the marketing program.

For example, the marketing manager of a bank designs a program implementing the company's goal of increasing the number of bank-affiliated credit card customers. Within the program, he creates two campaigns, one offering a card with 10% interest and a \$25 annual fee, the other offering 14% interest but no annual fee. These offers are sent to 250,000 of the company's customers who do not already have credit card accounts with the bank.

After 30 days, response information is used to:

- Send a welcome packet of information to each new credit card customer.
- Offer an 8%, \$25 annual fee card to everyone who did not respond.

When using repeating stages, be sure that your segment criteria excludes customers who were targeted in any previous wave of the same campaign or stage. This precaution prevents the customers from receiving redundant messages.

About the Program Execution Workflow

Multistage programs are programs that can be launched manually or automatically scheduled using the calendar. When you use the calendar, it can trigger key events such as loading a campaign (list generation) and launching a campaign (sending lists to vendors and sending offers to targeted contacts). The Program Schedule drives the process, with activities triggering the execution of each program. Each of these key events can be executed manually, using the Program Flow menu or the Program Explorer menus.

The Stage Execution workflow process shows how executing a program, loading a campaign, and launching a campaign occur in a multistage process.

When the stage is activated, Siebel Marketing applies a predefined allocation of segment counts to campaigns. Campaigns are loaded and launched, and if the stage is scheduled to repeat, the next occurrence of the stage is scheduled. Each stage of a program is a unique event, and Siebel Marketing tracks campaign and response history at the unique campaign wave level (for each run). For more information about workflow processes and the Siebel Business Process Designer, read *Siebel Business Process Designer Administration Guide*.

Creating Programs

When you create a new program, you specify an objective, a type (for example, Cross-sell or Win-back), a status (Active, Completed, or Planned), a revenue goal, and a budget figure.

When you add organizations to a program, any campaign that you add to a program (using the program flow or program explorer) inherits the program's organizations. The campaign that you add retains any existing organizations and existing lead partner.

The organizations in the campaign represent the union of the program's and campaign's organizations. After you add the campaign to the program, changes made to the organizations at the program are not reflected at the associated campaign level. Segments added to the program do not inherit the organizations. For more information, read [Creating Campaigns on page 119](#).

NOTE: You can turn off the teams and organizations inheritance features in Siebel Tools. In the appropriate business component, change the User Prop value for the Copy Teams and Copy Organizations property from Y to N. For more information, read *Using Siebel Tools*.

You can attach documents and other files and view program stages and status. In addition, you can add team members, activity plans, events, and design the actual program flow, using a graphical designer workspace.

To create a program

- 1 Navigate to the Programs screen.
- 2 In the Programs list, create a new record.
- 3 Complete the fields using [Table 16 on page 60](#) as a guide.
- 4 Save the program.

Table 16. Frequently Used Fields in the Program List

Field	Comment
Program Code	(Required) The program component of the source code.
Status	The default program status is In Planning. Options are Active, Cancelled, Completed and Scheduled. The status changes from In Planning to Active, and then Completed during program execution. Manual execution of the program does not affect this field.
Type	Choose a program type from the following list: Acquisition, Awareness, Cross-Sell, Loyalty, Referral, Retention, Up-Sell, Win-Back, Other
Planned Start/ Planned End	(Required) Defaults to the current date and time. Use the select button to change the defaults.
Execution Period	A period of time during which the program is to be executed.
Approval Status	A status field that indicates that the plan has been Approved, Declined, Submitted, or Needs Revision.
Approval History	Displays the history of approvals for the budget request.
Priority	Choose a priority from 1 to 5.
Duration (in days)	Calculated as the number of days between the program's Planned Start and Planned End. This value updates when you save the record.

Table 16. Frequently Used Fields in the Program List

Field	Comment
Region	Choose the region to which the program is related.
Organization	Click the Organization select button, and select the predefined organization to be responsible for the program. An organization that you assign to a program is inherited by campaigns in that program.

To add detailed information to programs

- 1 Click an existing program in the program list (Programs > Program List)
- 2 Click the Program Details view tab.
- 3 Complete the fields using [Table 17](#) as a guide.
- 4 Save the record.

Table 17. Frequently Used Fields in the Programs Details Form

Field	Comment
Objective	Enter a text description of the objective for this program.
Product Lines	Click the Product Lines select button to select product lines that this program promotes.
Products	Click the Product select button to select products that this program promotes.
Lead Partner	Choose a partner organization to associate with the program. The Lead Partner is limited to the organizations associated to the program.
Summary	Enter a summary that describes the program’s goals.
Program Template	Indicates the name of the program template (if any) that has been applied to this program.
Default Source Code Format	Click the Default Source Code Format select button to select a default source code format for this program.
Planning Period	You associate the planning period with the plan so that you can use it during categorization and reporting. For example, you may need to track a quarterly or annual planning period.
Budget Request	Indicates the budget requested for this program.
Requested Budget	Enter a requested budget amount.
Assigned Budget	Click the Budget select button to select the program’s currency code, exchange date, and budget amount. The budget value is a top-down figure, rather than a calculated bottom-up figure.
Forecast Expenses	This read-only field displays the sum of the expense data added in the Forecast view for campaigns associated with the program.

Table 17. Frequently Used Fields in the Programs Details Form

Field	Comment
Actual Expenses	Indicates the actual expenses associated with this program.
MDF Requested	Indicates the MDF requested for this program.
Net Expense (Forecast)	Calculated as Actual Expense less MDF Requested.
Forecast Revenue	Indicates the sum of the revenue predictions (based on data added in the Goals view) for campaigns associated with the program.
Actual Revenue	Indicates the actual revenue associated with this program.

About Using the Program Flow

The logical flow for both single-stage and multistage programs is designed using the Program Flow view. In this view, you graphically define the program’s single-stage or multistage logic by dragging and dropping program components such as campaigns, events, lists, segments, and stages into the workspace.

You can manually execute the program from the Program Flow view or execute the program by scheduling a stage. Before setting up the Program Flow, verify that the following tasks have been completed:

- Define segments and lists and associate them with the campaigns.
- Define campaigns and associated offers and events.
- Define segment trees, if required.

The Program Flow view displays the selected program’s details and the interactive workspace with a palette of objects representing program elements such as campaigns, internal lists, segments, and stages. To set up a program flow, perform the following tasks:

- 1 [Adding Stages to Programs on page 63](#)
- 2 [Using Repeating Stages Within Programs on page 63](#)
- 3 [Assigning Segments to Stages on page 64](#)
- 4 [Adding Campaigns to Stages on page 64](#)
- 5 [Setting Up Waves for Campaign Loads on page 65](#)
- 6 [Adding Imported or Internal Lists to Campaigns on page 67](#)
- 7 [Adding Trees to Stages and Allocating Segment Tree Cells on page 67](#)
- 8 [Creating and Applying Program Templates on page 68](#)
- 9 [Executing Programs on page 69](#)

Adding Stages to Programs

Use the following procedure to add a stage to a program, using the Program Flow workspace.

To add a stage to a program

- 1 Navigate to the Programs screen.
- 2 In the Programs list, click a program.
- 3 Click the Design view tab.
- 4 In the Program Flow workspace, select the Stage object from the palette, and drag it onto the workspace.
- 5 To complete stage details, double-click the stage object in the workspace.
- 6 In the Schedule view tab, in the Details list, add or modify stage details, using [Table 18 on page 63](#) as a guide.

NOTE: To display more fields, click the Details menu button, and then choose Columns Displayed.

Table 18. Fields in the Stage Detail Form

Field	Comment
Objective	Enter the program’s objectives.
Stage Code	The default is the record identifier for the stage. Change the identifier for the stage source code if desired, but make sure the value is unique.
Stage Name	Name of the stage. Change the stage name from the default value to something more meaningful such as Stage 1: Summer Program.
Summary	Enter summary text that describes the stage’s implementation.

Using Repeating Stages Within Programs

In most multistage programs, each stage occurs only once, separated by a specified number of days between stages. In some circumstances, you may want to have a follow-up stage repeat at a different frequency than a previous stage. For example, in Stage 1, you send a direct mailing with a Web site link to a large audience. In Stage 2, every day you monitor the Web site mentioned in the direct mail offer and call any customers who visit the Web site immediately. In this example, Stage 1 only occurs once, and Stage 2 repeats daily until the end of the campaign.

NOTE: When using a repeating stage, be sure that your segment criteria exclude customers that were targeted in a previous wave of the same campaign or the same stage.

To specify a repeating stage

- 1 Navigate to the Programs screen.

- 2 In the Programs list, click a multistage program.
- 3 Click the Schedules view tab.
- 4 In the Schedules link bar, click Details.
- 5 In the Stages list, select a stage to repeat.

NOTE: You cannot repeat Stage 1.

Assigning Segments to Stages

You previously defined segments with criteria in the Segment Designer. You can assign these segments to the program stage.

To add segments to the program stage

- 1 Navigate to the Programs screen.
- 2 In the Programs list, click a program.
- 3 In the Program Flow workspace, select a Campaign object.
- 4 In the Objects palette, click and drag the Segment object to the workspace.
- 5 In the Previously Used Segments dialog box, perform one of the following steps:
 - a To create a new segment, click Choose a New Segment and select the location of the segment to use, and then click OK.
 - b Select a segment from the list and click OK.

The segment object appears in the workspace.

Repeat [Step 5](#) to add more segments to a stage.

NOTE: When you include stand-alone segments (not part of a segment tree) in a stage, the members of the stand-alone segments are not deduplicated against other segments, trees, or lists in the stage.

Adding Campaigns to Stages

If you previously defined and saved campaigns with associated offers using the All Campaigns form, you can add them to the program.

To add predefined campaigns with associated offers

- 1 Navigate to the Programs screen.
- 2 In the Programs list, click a program.
- 3 In the Program Flow workspace, select the Stage object.
- 4 In the Objects palette, select the Campaign object, and drag it from the palette to the workspace.

- 5 In the Pick Campaign dialog box, select the campaign, and click OK.

NOTE: If the campaign you want is not listed in the Pick Campaign dialog box, it may be already associated with another program. Although offers are reusable, campaigns are not. Use the My Campaigns or All Campaigns view to determine which program is using the campaign. Then, create a new campaign with a different name and the same offers.

To define a new campaign with offer from the Pick Campaign dialog box

- 1 Navigate to the Programs screen.
- 2 In the Programs list, click a program.
- 3 In the Program Flow workspace, select the Stage object.
- 4 In the Objects palette, select and drag the Campaign object from the palette to the workspace.
- 5 In the Pick Campaigns dialog box, create a new record, enter a name and description for the campaign, and click Save.
- 6 In the Pick Campaign dialog box, select the campaign, and click OK.
- 7 In the workspace, double-click the Campaign object to open the Campaign Offers view.
- 8 To add an offer, in the Offers list, create a new record.
- 9 In the Add Offer dialog box, select an offer, and then click OK.

NOTE: To gauge response to the offer, in some marketing programs, a control segment of customers may be targeted by a test campaign with no associated offer. For more information, read [Testing Campaigns That Have Email, Fax, and Wireless Offers on page 143](#).

Setting Up Waves for Campaign Loads

If your marketing program consists of a one-time campaign and offer—and you are confident that your organization can handle the volume of responses—then you probably do not need to define multiple waves. Siebel Marketing provides a 100 % fully allocated wave (with a wave code of A and a time lag of 0) when a campaign is created.

If you are planning a multistage recurring campaign and anticipate a large distribution list of contacts to receive an offer, you may want to take a measured approach to distribution and split fulfillment of the offer among a number of waves.

Waves, or set distribution periods, are commonly used to:

- **Test the campaign concept.** An initial sampling to gauge campaign response is followed by a larger distribution.
- **Examine the campaign mechanics.** A measured distribution of the campaign offer provides information to guarantee the campaign mechanism works efficiently from order entry, to fulfillment, to response tracking.
- **Balance the load on a fulfillment center.** In this case, each wave may include 10-15% of the list to make sure existing resources can reasonably handle launching a campaign, including managing campaign responses.

In addition to setting up waved distribution periods, you can set a lag time for additional waves that reference the stage launch date, and then split the generated list by a percentage of contacts for each wave period. You can also split by a List Measure. The measure must be included in the list to be available for use in splitting the list.

You can use the List Distribution list to specify the vendor export list format and distribution method for each wave. Before creating a second wave, decrease the number in the % field of the first wave, which, by default, is 100%. The total percentage of values cannot exceed 100.

To set up multiple waves for a campaign load

- 1 Navigate to the Campaigns screen.
- 2 In the Campaigns list, click a campaign name.
- 3 Click the Design view tab.
- 4 Click the Wave Settings link bar.
- 5 In the Waves list, create a new record.
- 6 Complete the necessary fields, using [Table 19](#) as a guide, and save the wave record.

Table 19. Fields in the Campaign Waves Form

Field	Comment
Wave Code	Enter a wave code, up to 10 characters. You cannot save the record without a wave code. The wave code appears as part of the source code for the campaign member if you set up the source code format to include it. The wave code for the default wave is A.
Description	Describe the characteristics of the wave.
Lag	The default is 0. Enter the amount of time the wave is delayed after loading a campaign. The maximum lag for the waves cannot be greater than number of days between the start date and end date of the campaign. The wave is launched when the server processes the Launch Campaign request. This server process can be scheduled or can be manually started using the right-click menu in the Program Flow workspace.
Lag Unit	Choose either Hours or Days.
%	The default percentage is 100 for a single wave. If you are planning multiple waves, first reduce the percentage number in the first wave and enter the percentage of contacts that are included in the second wave. The total percent values cannot exceed 100%.

Adding Imported or Internal Lists to Campaigns

Imported or internal lists of contacts may be added to the campaign. To check the status of an imported list, double-click the list icon in the Program Flow workspace to display the List Contacts and Prospects view.

To add a list to the campaign

- 1 Navigate to the Programs screen.
- 2 In the Programs list, click the program name.
- 3 In the Program Flow workspace, select the Campaign object.
- 4 From the Objects palette, select the List object, and drag it to the workspace.
- 5 In the Pick Campaign List dialog box, select an imported or internal list, and click OK.

The List object appears in the workspace, linked to the stage and referencing the campaign.

NOTE: To view and edit list details, double-click the List object in the workspace.

Adding Trees to Stages and Allocating Segment Tree Cells

You can use one segment tree in each stage of your program. After you associate campaigns and a segment tree to a stage of the program, you must allocate each segment tree cell to the campaigns.

Adding a Segment Tree to a Stage

You can use one segment tree in each stage of your program.

To associate a segment tree to a stage

- 1 Navigate to the Programs screen.
- 2 In the Programs list, click the program name.
- 3 If you are not in the Design view > Program Flow link, click the Design view tab, and then click Program Flow.
- 4 In the Program Flow workspace, select a stage.
- 5 Drag the Segment Tree icon on to the workspace.
- 6 In the Pick Segment Tree dialog box, click Choose a new Segment Tree.
- 7 In the second Pick Segment Tree dialog box, from the folders, select the Segment Tree.
- 8 In the Pick Segment Tree dialog boxes, click Save, and then OK to save the tree in the program flow.

Allocating Segment Tree Cells to a Stage

After you associate campaigns and a segment tree to a stage of the program, you must allocate each segment tree cell to the campaigns. If you include stand-alone segments in the stage that are not part of the segment tree, the members of the segment are not deduplicated against members of the tree or against other stand-alone segments. Only segment tree cells are deduplicated against other cells.

To allocate segment tree cells to a stage

- 1 Navigate to the Programs screen.
- 2 In the Programs list, click the program name.
- 3 If you are not in the Design view > Program Flow link, click the Design view tab, and then click Program Flow.
- 4 In the Program Flow workspace, select a segment tree for allocation, and click Allocate Segment Tree.

NOTE: In the segment tree structure, each cell appears with the net counts and the priority used for deduplication.

- 5 In the allocation matrix, perform the following steps:
 - a If the tree does not match the latest version of the tree that is in the Segment Tree Designer, click Refresh Tree.

This action redraws the tree structure (refreshes the stored definition of the tree in the database), and clears any allocations. The row across the top right displays the name and campaign code for each campaign.
 - b Select the appropriate check boxes to indicate which cells should be allocated to each campaign.

You can allocate a single cell to more than one campaign, if desired. If you want each cell to receive a single campaign, be sure to check only one box per row. The total allocated count appears along the bottom of the matrix as you check the boxes.
- 6 To enforce a capacity limit for each campaign load, then in the Capacity Limit field for the column, enter a value.

A value of 0 (zero) is ignored (no limit).

- 7 Click Save.

CAUTION: The Design view does not automatically save your changes to the matrix. If you do not click Save, the changes are not written to the file.

Creating and Applying Program Templates

You can save any program you create as a reusable program template. The template retains many of the planning details from the program such as the program flow, related campaigns, activity plans, documents, and other details. After you create a program template, you can apply the template to new programs. You can also share the template with other employees in your organization.

Program templates also include child campaign templates for each of the campaigns in the design. For more information about campaign templates, read [Creating and Applying Campaign Templates on page 126](#).

To save a program as a program template

- 1 Navigate to the Programs screen.
- 2 In the Programs list, click a program to use as a template.
- 3 In the Program form, click the menu button, and choose Save As Template.
This menu option is active only if your administrator has given you permission to use this action (using the Marketing access groups).
- 4 In the Save As Template dialog box, enter a name, and click OK.
- 5 To make changes to the new template, navigate to the Marketing Templates screen > Program Templates view.
- 6 Query for the template you created in [Step 4 on page 69](#).
- 7 In the template list or form, make the necessary changes.

To apply a program template to a program

- 1 Navigate to the Programs screen.
 - 2 In the Programs list, either create a new program, or select the program name to which to apply the template.
 - 3 In the Program form, click the menu button, and choose Apply Template.
 - 4 In the Apply Template dialog box, select the template to apply, and click OK.
 - 5 When asked if you want to continue, click OK.
The Message dialog box, appears, confirming that the template was applied.
- NOTE:** You cannot apply a program template if your program already has stages in the program flow. If your program has existing stages, delete them from the program flow before applying the template.
- 6 In the Message dialog box, click OK.

Executing Programs

You can manually execute a program from the Program Flow link in the Design view. Alternatively, you can execute a program by scheduling a stage in the calendar. In the Schedule view, you use the calendar link to invoke the workflow process and execute the server tasks.

To execute a program using the Design view

- 1 Navigate to the Programs screen.

- 2 In the Programs list, click the program name.
- 3 In the Design view, click Program Flow
- 4 In the Design view, right-click on the campaign.
- 5 Select Load Campaign.
- 6 In the Load Campaign Dialog Box, select the time and date, and click OK.
- 7 In the Design view, right-click on the campaign.
- 8 Select Launch Campaign.
- 9 In the Launch Wave dialog box, select the wave or waves to launch, and click OK.

6

Creating and Using Offers

Offers are a way to present content on product and services to current and potential customers as part of a campaign.

This chapter contains the following sections:

- [About Creating and Using Offers on page 71](#)
- [Creating, Modifying, and Associating Products with Offers on page 72](#)
- [About Creating and Editing Offer Templates on page 75](#)
- [Creating Offer Templates and Adding to the Template List on page 76](#)
- [About Email Offers on page 78](#)
- [Previewing Offers on page 90](#)
- [Personalization Items on page 90](#)
- [About Creating Conditional Content on page 94](#)
- [About Fax Offers on page 98](#)
- [Web Offers on page 101](#)
- [Creating Other Offer Types on page 106](#)
- [Associating Literature with Offers on page 111](#)

About Creating and Using Offers

Offers are associated with a campaign, and then presented to contacts and prospects when the campaign is launched. Offers can be reused in many campaigns, but the campaign is a one-time instance of the offer presented to a customer at a certain point in time.

Offers associated with campaigns are created using the Offers screen. Typically each campaign has a single offer, but you can associate multiple offers with one campaign. For example, a single campaign may have email and Web offer treatments.

Using the Offers views, you can create, edit, and preview reusable multichannel offers, which can be associated with your campaigns.

In addition, you can design personalized HTML and text templates for email and wireless offers. You can create emails containing conditional content that is based on contact and prospect attributes. Additionally, emails can contain embedded links to items such as Web offers, and Web surveys so the marketer can assess and capture campaign responses. Web Offers can contain embedded links to Web surveys, events and related URLs, downloads, and response forms.

Process of Creating and Modifying Offers

To create and modify offers, perform the following tasks:

- [Creating, Modifying, and Associating Products with Offers on page 72](#)
- [Associating Products with Offers on page 75](#)

Creating, Modifying, and Associating Products with Offers

You can create reusable offers in the Offers screen, adding details such as the channel to use, activation and expiration dates, templates, literature, and so on. For more information about using offer templates to create an offer, read [Creating Offer Templates and Adding to the Template List on page 76](#).

Use the Offers link bar to navigate directly to an offer type. The types of offers that are available to you depend on the features your company is licensed to use. After you create or modify an offer, you can associate products with the offer.

Creating and Modifying Offers

You can use the following procedures to create and modify offers. After creating an offer you can associate an offer template with it.

To create an offer

- 1 Navigate to the Offers screen.
- 2 In the All Offers list, create a record.
- 3 Complete the fields, using [Table 20 on page 73](#) as a guide.

To modify an offer

- 1 Navigate to the Offers screen.
- 2 In the All Offers list, select an offer to change.

- 3 Make the necessary changes, using guidelines in [Table 20](#).

Table 20. Selected Offer Fields

Fields	Comment
Offer Code	Contains a unique code that identifies the offer. You can change this code, but make sure the new value is unique.
Channel	Identifies the channel used to distribute the offer. For example, Email, Fax, or Wireless Message.
Type	Designates the purpose of the offer. For example, Cross-Sell, Retention, or Up-Sell.
Activation Date	Identifies the date that the offer becomes active. You can associate an inactive offer with a campaign, but when you launch the campaign, only active offers are executed.
Expiration Date	Use the calendar controls to select the offer's expiration date. Expired offers should not be associated with campaigns because they are not sent out when the campaign is launched.
Description	Enter a description of the offer.
Subject Text	Used for email offers. The text to appear in the subject line of the email. You can include merge fields in the subject line if desired. For example: Exciting offer for [Field: M/M] [Field: First Name] [Field: Last Name].
Approval Status	Indicates if the offer has been submitted, approved, or declined.
Approval History	Shows the approval history of the offer.
Products	Use to indicate which products are being promoted by this offer.

Table 20. Selected Offer Fields

Fields	Comment
Price List	<p>Used to associate a previously defined price list with this offer.</p> <p>A marketer can create promotional prices for specific products. When an offer recipient clicks a product item hyperlink in an email or Web offer and goes to the product detail Web page, the recipient sees the promotional price that was defined using Siebel Pricer.</p> <p>The set of products associated with the selected price list can be different from the set of products defined in the offer's product list. When a contact responds to an offer, clicks a product link, and goes to the product detail page, the contact sees the promotional price that is defined for that product only if that product is a part of the price list that was selected for this offer. Otherwise, the contact gets the default price for the product.</p>
Language	For email offers, do not change the value in this field.
Locale	Used to locate the correct, language-specific Web page.
Email Marketing Server	<p>Used for email offers and Web offers only. Use to select the Email Marketing Server when sending an Email Offer. This server provides the following:</p> <ul style="list-style-type: none"> ■ From and Reply-To header values. ■ Connection details for the email sending daemon. ■ SMTP envelope Sender address domain (for bounces). ■ Base URL to use in constructing Response Forms and Related URLs. ■ Web Server base URL (for product catalog items, Web offers, Web surveys, some response forms, and events).
Subscription List	Use to select a marketing list of type Subscription List and associate this list with this offer. The subscription list may already have contacts or prospects or be empty.

Table 20. Selected Offer Fields

Fields	Comment
Create Activity check box	Used for email offer templates. Select this option to set activity logging. When the email is sent, an activity is created for each recipient of the email, stating that the email was sent. The activity record is created through the System Activity Object for either the Campaign Recipient or Campaign Position business components.
Delivery Profile	Used when sending fax offers. This field is only available in the fax offers view, not in fax offer records in the All Offers view. Profiles are created using the Communications Administration screen's Communications Drivers and Profiles view. For more information, read Creating Delivery Profiles and Associating with Fax Offers on page 100 .

Associating Products with Offers

You can associate predefined products with the offer. Ideally, you should only select a subset of products from the price list associated with an offer, because there is a many-to-one relationship between the products and the price list. The products that you associate with the offer determine which product catalog page links can be embedded in Email and Web offers.

To associate a product with an offer

- 1 Navigate to the Offers screen.
- 2 In the All Offers list, select the offer and click the Products select button.
- 3 In the Products dialog box, in the Available list, select one or more products, and then click Add to copy them to the Selected list.
- 4 Click OK.

About Creating and Editing Offer Templates

All offers must be based on an offer template. A template can be empty or can include text and other elements. Offer templates are available in Siebel Marketing, Siebel Web Marketing, and Siebel Campaigns. You can create the document that will serve as a template using any HTML tool or text editor such as Adobe GoLive, Macromedia Dreamweaver, Microsoft Front Page, or Windows Notepad. After creating the source document you upload it to the Offer Templates list.

After creating a template, you add the file to the template list and associate the template with an offer. When you associate a template with an offer, Siebel Marketing creates a copy of the template, leaving the master unaffected. This copy has the same name as the original and adds a time stamp to provide a history.

Offer templates can be associated with the following offer types:

- **Fax offers.** For more information on Fax offers, read [Associating Templates with Fax Offers on page 99](#).
- **Email offers.** When creating an email offer, you can use the Edit Email view tab to associate a template with the offer.
- **Web offers.** When creating a Web Offer, you can use the Edit Web Offer view tab to associate a template with the offer.

Process of Creating and Editing Offer Templates

To create and edit offer templates, perform the following tasks:

- [Creating Offer Templates and Adding to the Template List on page 76](#)
- [Using Merge Fields in Email Offers on page 92](#)

Related Topics

- [About Using Hyperlinks \(HREF\) in Offer Templates on page 77](#)
- [Personalization Items on page 90](#)
- [Merge Fields Personalization Item on page 90](#)

Creating Offer Templates and Adding to the Template List

Offer templates are usually created with a file type of text (TXT) or HTML (HTM or HTML). You create the template using third-party HTML tools and text editors, such as Microsoft Front Page and Windows Notepad.

After creating the template using a third-party tool, you must add the new template to the Offer Templates list so that you can associate it with an offer.

To create an HTML or text offer template

- 1 Create an HTML template, using third-party HTML or text editor of your choice:
 - a Using Microsoft Word, Front Page, Notepad, or another editor, create a new file.
 - b For HTML templates, save the file using an HTM file extension.

CAUTION: Take care when using quotation marks in personalization elements. Some applications replace straight quotation marks (") with curly (also called smart) quotation marks ("). Curly quotation marks cause errors when used in personalization elements.

- 2 If it does not already exist, create a directory of your HTML templates directory and name it Images.

In this directory, you store the graphics to be used in the offer. Make sure that you refer to each image as follows, replacing image.gif with the name of the embedded image:

```
<IMG BORDER=0 SRC="http://<server name>/Web Marketing/images/image.gif">
```

NOTE: You cannot use HTML or embedded images in text email. However, some email readers display images that the sender attached to a text email at the end of the text email.

- 3 Add the template you created to the Offer Templates list.
- 4 Copy the images you embedded in your offer to the subdirectory you created or the image folder you referenced in [Step 2](#).

To add a template to the Offer Templates list

- 1 Navigate to the Offers screen.
- 2 In the Offers link bar, click Offer Templates.
- 3 In the Offer Template list, create a record.
- 4 Complete the fields to add the offer template to the list:
 - a In the Name field, enter a name for the template.
 - b Click the File Name select button and select the template file.

To modify an existing offer template

- 1 Make the necessary modifications to the template file saved on your local drive, using the same text editor used to create the file.
- 2 Save and close the file.
- 3 Navigate to the Offers screen > Offer Templates view.
- 4 In the Offer Template list, select the template record.
- 5 In the File Name field, click the select button.
- 6 In the Add Attachment dialog box, click Browse.
- 7 Select the file, and click Open.

About Using Hyperlinks (HREF) in Offer Templates

Siebel Marketing can perform a special processing task for HTML-based emails and Web offers. A URL address entered directly into the body of an HTML template, such as `http://www.mycompanyname.com`, is not recognized as a hyperlink by the HTML parser. The generic HTML syntax for a hyperlink is:

```
<a href="target url">highlighted text or picture</a>
```

The link includes both the URL and the anchor, which is the text or image that appears in the template and links to the URL. Thus, to create a link to the URL <http://www.mycompanyname.com> and display the web site as the text in the message, you must enter the following:

```
<a href="http://www.mycompanyname.com">MyCompanyName web Site</a>
```

Using this method, Web offers, response forms, and product items are replaced differently in HTML templates from the way they are replaced in text templates. The following list describes the default method for processing hyperlinks:

- For Web offers, Web surveys, and product links, Siebel Marketing creates the hyperlink so that the hyperlinked text is the Web offer name, Web survey name, or product name such as in the following reference:

```
<a href="[web offer: 10% discount offer]">10% discount offer</a>
```

For more information, read [Personalization Items on page 90](#).

- For Response forms, Siebel Marketing creates the hyperlink so that the hyperlinked text is the same as the Response forms description in the Response Types view. The hyperlinked text for a response form can be modified in the Response Types view, where, for each response form, a description field represents the value used for highlighted text.

These default methods for processing hyperlinks in Siebel Marketing can be modified. You can put an asterisk (*) before the tag to tell the application that you are manually defining the hyperlink format in the HTML body. The asterisk tells the application not to create the hyperlink.

For example, instead of inserting [Web Offer: Great Discount], the marketing manager can enter the following:

```
<a href="[*web offer: Great Discount]">Whatever I want to highlight be it text or picture</a>
```

In this case, Siebel Marketing replaces the Web Offer with the proper URL but does not create the HREF syntax. You can then create a Web offer link, product item link, and response form link with any text or picture you desire.

About Email Offers

Email offers are available in Siebel Marketing. Using the Email Offers view, a marketer can design and distribute a personalized email offer to target recipients of a campaign. An email offer can be associated with a price list for various products. If the recipient clicks on a product link in an email offer, the product detail page displays the promotional price for that product rather than the list price.

The Email Offers view includes the Offer Details, Edit Email, Delivery Profile, Attachments, and Advanced tabs.

- **Offer Details.** This form contains additional fields that you can use if the email offer requires approvals from your company's marketing and legal departments. It provides a unique identifier for the offer in the Offer Code field. Use this form to specify the email offer's Subject Text, the Email Marketing Server (Reply-To and From headers, Email Marketing Daemon configurations, and Web Server URLs) to be used to distribute the offer, and Personalization Format to use with this offer.

- **Edit Email.** Use this form to edit the template content as well as select Personalization Items such as Product Catalog Item. Category elements can be inserted into the template in the HTML Editor.
- **Delivery Profile.** This read-only list provides a list of the Email Marketing Server parameters for the Email Marketing Server that is associated with the offer.
- **Attachments.** Includes literature items with your email offer. These items are delivered as attachments to the email when the campaign is launched.
- **Advanced.** Contains the Related Web Offers, Related Web Surveys, Related Events, and Related URLs lists. Use these lists to specify the Web offers, Web surveys, events, and URLs that you plan to include as hyperlinks in the email offer. Adding these elements embeds them as a Personalization Element. Web Surveys are created using Siebel SmartScript. For more information, read *Siebel SmartScript Administration Guide*.

Whenever an offer recipient clicks a Web offer, Product Catalog Item, or Related URL link in an email offer, the click is captured as a response. The available response types are Clicked On Web Offer, Clicked On Web Survey, Clicked On Product URL, and Clicked on URL.

NOTE: Siebel Events views are not currently included in the Siebel Web Marketing application. Therefore, if you embed a related event in an email offer, related events must be directed to the Web Server on which Siebel Events is installed. To accomplish this, the Web Server field must contain the location of the Web Marketing Web Server and the location of the Events server. For more information read the Web Server field in [Table 20 on page 73](#).

Process of Working with Email Offers

To set up Email Offers, perform the following:

- [Creating Email Offers on page 80](#)
- [Associating Templates with Email Offers on page 83](#)
- [Editing Offers on page 84](#)
- [Adding Attachments to Email Offers on page 87](#)
- [Adding Response Forms to Email Offers on page 87](#)

Related Topics

- [About Merge Fields in Email Offers on page 93](#)
- [Adding Response Forms to Email Offers on page 87](#)
- [About Creating Conditional Content on page 94](#)
- [If-Then-Else Personalization Element on page 94](#)
- [Named Blocks Personalization Element on page 96](#)
- [Creating, Modifying, and Associating Products with Offers on page 72](#)

Creating Email Offers

Siebel Marketing has multiple forms of email offers available for use in campaigns. The following topics cover these offers.

- [Creating Email Confirmation Offers on page 81](#)
- [Creating Email Welcome Offers on page 82](#)
- [Including Forward to a Friend in Your Email Offers on page 82](#)
- [Creating a text email from an HTML template on page 83](#)

To create an email offer

- 1 Navigate to the Offers screen.
- 2 Click Email Offers.
- 3 In the Email Offers list, create a new record.
- 4 Complete the fields, using [Table 20 on page 73](#) as a guide.

Email offers have their own specific channel types available. [Table 21](#) describes these email-specific channels. You must always create an offer using the Email channel. Use the other channels when implementing a double-opt in or subscription confirmation process. When you create offers using these other channels, they must be associated with the same campaign as the original Email channel offer.

Table 21. Channel Types for Email Offers

Email Channel	Description
Email	The Email channel is for standard email offers that do not use a subscription list.
Email-Confirm In	The Email-Confirm In channel produces a confirmation opt-in offer that is delivered to users. The confirm-in offer is triggered by a user responding to the "Confirm Subscribe to List" Response Form. When this response form is clicked, this confirmation is delivered to the user with an additional link asking to confirm opt-in status to the email program. For more information, read Creating Email Confirmation Offers on page 81 .

Table 21. Channel Types for Email Offers

Email Channel	Description
Email-Confirm Out	<p>The Email-Confirm Out channel produces a confirmation opt-out offer that is delivered to users. The confirm-out offer is triggered by a user responding to the "Confirm Unsubscribe List" Response Form. When this response form is clicked, this confirmation is delivered to the user with an additional link asking to confirm opt-out status to the email program.</p> <p>For more information, read Creating Email Confirmation Offers on page 81.</p>
Email-Welcome	<p>The Email-Welcome channel produces a standard welcome message to the email program. This message is triggered by a user recording a subscription record in the database. This message is triggered by a user responding to the "Subscribe to List" response form.</p> <p>This message does not ask for confirmation, thus it is not a replacement for the Email-Confirm In channel. Use the Welcome channel when you do not want to have a double opt-in method as is used by the Email-Confirm In channel.</p> <p>For more information, read Creating Email Welcome Offers on page 82.</p>

Creating Email Confirmation Offers

Email confirmation offers are used to respond to customers who have clicked on a “confirm subscribe to list” response form or a “confirm unsubscribe to list” response form in a previous message. These offers are sometimes called double opt in or double opt out offers because from the recipients’ point of view they must take two actions to opt in or out. The first act is to click on a response form in an initial email, the second is to respond to the confirmation email. If you do not require your customers to go through two steps to opt in, you can send an Email-Welcome offer instead of an Email-Confirm In offer. For more information, read [Creating Email Welcome Offers on page 82](#).

Siebel Marketing sends out an Email-Confirm In or an Email-Confirm Out message to only those contacts who have clicked those response forms. If your list includes contacts for whom there is no record of the “confirm subscribe to list” or “confirm unsubscribe to list” events, Siebel Marketing skips over them and does not send a confirmation offer.

To create an email confirmation offer

- 1 Navigate to the Offers > Email Offers screen.
- 2 Create a new email offer.
- 3 Set the Channel field to either Email-Confirm In or Email-Confirm Out.
- 4 Associate a subscription list to the offer.
- 5 Associate an offer template to the offer.
- 6 In the edit email view, include a response form for Subscribe to List within the body of the message.
- 7 Save the offer.

- 8 Navigate to the Campaigns view.
- 9 Associate the offer to the appropriate email confirmation campaign.

Creating Email Welcome Offers

If you do not require your customers to use a double opt-in confirmation to accept the offer, then after the customer has clicked on the "subscribe to list" response form, you should follow up with an Email-Welcome offer. Siebel Marketing sends out an Email-Welcome message to only those contacts who have clicked the "subscribe to list" response form. If your list includes contacts for whom there is no record of the "confirm subscribe to list" event, Siebel Marketing skips over them and does not send the Email-Welcome offer.

To create a welcome message

- 1 Navigate to the Offers > Email Offers screen.
- 2 Create a new email offer.
- 3 Set the Channel field to either Email-Welcome.
- 4 (Optional) Associate a subscription list to the offer.
- 5 Associate an offer template to the offer.
- 6 Save the offer.
- 7 Navigate to the Campaigns view.
- 8 Associate the offer to the appropriate email confirmation campaign.

Including Forward to a Friend in Your Email Offers

Siebel Email Marketing can include a Forward to a Friend link in email offers. This provides a means for your contacts and prospects to forward a version of the message to others and optionally to add a personalized note as well.

To include Forward to A Friend in an offer

- 1 Navigate to the Offers > Email Offers screen.
- 2 In the Offers list, click an email offer.
- 3 Select a template to edit.
- 4 In the primary personalization menu, choose Response Forms.
- 5 In the secondary menu, choose [Response: Forward to a Friend].
- 6 Identify the location to insert the Forward to a Friend link.
- 7 Click Insert.

To include the personalized note in the forwarded message, a special merge field must be included within the body of the offer. This merge field inserts the personalized note in forwarded messages but is ignored in standard deliveries.

To insert a personalized note merge field

- 1 While editing the template, in the primary personalization menu, choose Merge Fields.
- 2 In the secondary menu, choose [Field: Forwarder Message].
- 3 Identify the location to insert the Forwarded message, typically this is at the top of the message.
- 4 Click Insert.

Creating a text email from an HTML template

You can create a text version of your HTML offers. By creating the text version, you can streamline your production efforts. This creates a text template from the HTML template. You may need to adjust the formatting prior to delivery.

To create a text email from an HTML template

- 1 Navigate to the Offers > Email Offers screen.
- 2 In the Offers list, click an email offer.
- 3 In the list between the Offers list and the Editor, create an additional template for the offer.
- 4 In the Template Name field, choose a text offer template and click Ok.
- 5 Return to the HTML template within the offer.
- 6 Click Save Text Template.
- 7 To view the results, select the text template in the list above the Editor.
The text content appears in the Editor.

Associating Templates with Email Offers

This section describes how to associate a template with an email offer. To edit the offer template, read [About Creating and Editing Offer Templates on page 75](#).

To associate an offer template with an email offer

- 1 Navigate to the Offers screen > Email Offers view.
- 2 In the Email Offers list, select the offer.
- 3 In the Edit Email tab, create a new record.
- 4 In the Edit Email list, complete the necessary fields.

- a Siebel Marketing populates the Sequence field. Change the sequence if you are adding multiple templates with rich and plain format. The sequence field includes email attachments. Therefore, when you add your first template, you may get a sequence number other than 1.

For example, if you have two templates (one HTML and one text) associated with the email offer, adjust the sequence so that you associate the plain format (text) first and the rich format (HTML) last. This change satisfies the Multipart MIME standard. The Multipart MIME standard defines a way to send both the text and HTML content together within the body of a single email message. The email program displays only the part that it has been configured to display.

- b In the Template Name field, click the select button.

You can associate one text template and one HTML template with the offer.

- c In the Pick Offer Template dialog box, select the template record, and click OK.

- 5 Save the record to associate the template with the offer.

Editing Offers

After you add a template to an offer, you can edit it in the following ways:

- **Edit a template in the Offers screen.** Make changes to your offer using the HTML editor or a text editor. In the Edit Email view, select a template to modify. The template appears for editing at the bottom of the page.

If you created your template as an HTML file, you can use the HTML editor to render the HTML source (tags and text) and to modify the rendered HTML. If you created your template as a text file, a text editor displays the offer contents for editing. Preview it to verify the offer's syntax, including merge fields and embeddable objects.

- **Modify a template using a third-party HTML editor.** If you need to make edits that are not possible in the HTML editor, you can modify the template using a third-party HTML editor. Examples of third-party editors are Adobe GoLive and Macromedia Dreamweaver. For more information, read [Editing a Template Using a Third-party Default HTML Editor on page 86](#).

To edit an email offer

- 1 Navigate to the Offers screen.
- 2 Click an email offer.
- 3 In the Edit Email tab, select a template to change.

One of the following editors starts:

- **Text editor.** You use this tool to make simple changes to the text. The text editor starts by default, if the selected template is a text (.txt) file.
- **HTML Editor.** You can use this tool to make more complex changes than you can make in a text editor. The HTML editor starts by default, if the selected template is an HTML file (HTML or HTML file extension). For more detail, read [Using the HTML Editor on page 85](#).

- 4 If using the HTML editor, check that the Personalization Items toolbar is displayed.
 - a Right-click anywhere in the toolbar area.
 - b In the menu, check the Personalization Items option. If it is not checked, check it.
- 5 To imbed a personalization item (such as a response form or related URL):
 - a Locate the position in the offer text where the personalization item is to appear.
 - b In the Personalization Items toolbar, choose a personalization item from the primary menu. such as Events, Merge Fields, Product Catalog Items, Related URLs, Response Forms, Web Offers, or Web Surveys. For more information, read [Personalization Items on page 90](#).

The available elements for the selected category appear in the secondary menu.

 - c In the secondary menu, choose a personalization item and click Insert.
- 6 When you finish making changes, click Save Template.
- 7 To preview your changes and verify that the template still performs correctly, click Verify & Preview.

Repeat [Step 3](#) through [Step 7](#) to continue editing the template.

Using the HTML Editor

You can use HTML editor to make changes to your HTML template. To make more complex changes than allowed in the HTML editor, read "[Editing a Template Using a Third-party Default HTML Editor](#)" on [page 86](#).

The HTML editor supports the following features:

- Alignment options: left, center, and right
- Alt-tag support
- Bold, italic, and underline
- Bulleted List
- Clip art support
- Copy, cut, and paste
- Fonts (typeface, size, style)
- Find and replace
- Graphic support
- HTML formatting characters such as: NBSP (non-breaking space)
- HTML source view
- Hyperlinks
- If-Then-Else conditional statements
- Image map support
- Indents

- MS Office document integration
- Numbered Lists
- Personalization support (events, merge fields, response types, web surveys)
- Spelling checker
- Styles
- Tables
- Undo and redo
- Upload content to web servers

To make changes using the HTML editor, you enter your changes directly in the workspace. In addition, you can use the editing toolbar in the Template Contents workspace for formatting text. Most of the buttons on the toolbar are the same buttons that appear in standard text editing software. [Table 22](#) summarizes some of the typically used tasks and how to accomplish them.

Table 22. HTML Editor Commands

To do this ...	Right click in the workspace and choose ...
Copy selected text or graphics	Copy
Cut selected text or graphics	Cut
Insert a graphic	Picture
Insert a hyperlink	Hyperlink
Insert HTML	Insert HTML
Paste plain text only, removing any embedded HTML tags or other formatting	Paste text
Paste the most recently copied text or graphics	Paste
Remove unnecessary HTML tags	Clean HTML
Switch view to show a preview of the page	View as WYSIWYG (default)
Switch view to show text with HTML tags	View as HTML

Editing a Template Using a Third-party Default HTML Editor

If you prefer to use a third-party HTML editor over the HTML editor, you can do so using the following procedure.

To edit a template file using your default HTML editor

- 1 Navigate to the Offers screen and, from the Offers link bar, select the type of offer.
- 2 In the Offers list, select an offer, and click the Edit Email or Edit Web Offer tab.
- 3 For email offers, select the HTML template in list between the Offers form and the Editor.

- 4 In the HTML Editor toolbar, click the View Source icon.
- 5 Copy all the text in the workspace to your third-party HTML editor.
- 6 In the third-party HTML editor, make changes to the template.
- 7 Paste the changed template source text back into the HTML editor.
- 8 In the Edit Email list, associate the HTML file to an offer.

Adding Attachments to Email Offers

Use the following procedure to add literature items as email offer attachments. Be aware that some Internet Service Providers limit the size of emails and email attachments that they deliver to their subscribers.

To add an attachment

- 1 Navigate to the Offers screen > Email Offers view.
- 2 In the Email Offers list, click the offer name.
- 3 Click the Attachments view tab.
- 4 In the Attachments list, create a new record.
- 5 Click the Name select button, select a literature file to attach, and click OK.
- 6 In the Attachments Label field, enter an attachments label for each file.

Adding Response Forms to Email Offers

You can include a variety of response forms in an email offer. Whenever a customer receives the email offer and clicks on the hyperlink for a response form, responses are created for the campaign.

Response types are fields in a response record. A response record may be generated by the email recipient clicking the response form link or by completing a form on the Web page to which he or she has been directed.

[Table 23 on page 88](#) contains a list of response forms that are unique to email offers and a brief description of each.

To add a response form to an email offer

- 1 Navigate to Offers screen > Email Offers.
- 2 In the Email Offers list, click an email offer name.
- 3 Click the Edit Email view tab.
- 4 Click a template to edit.

The template appears in the workspace.

- 5 In the Personalization Items tool bar drop-down list, choose Response Forms using [Table 23 on page 88](#) as a guide.
- 6 In the adjacent drop-down list, choose a response type.
- 7 Position the cursor at the desired location in the content, and click Insert.
- 8 When you are finished editing, click Save Template.

Table 23. Response Forms and Descriptions

Response Form	Description
Confirm Subscribe To List	Use this in an initial email offer to activate a double opt-in process. When the recipient clicks the embedded link, Siebel Marketing sends an email confirm-in offer with a "subscribe to list" response form.
Confirm Unsubscribe from List	Use this in an initial email offer to activate a double opt-out process. When the recipient clicks the embedded link, Siebel Marketing sends an email confirm-out offer with an "unsubscribe to list" response form.
Forward to friend	<p>Navigates customers to a page where they can add the email address of friends and from where your company can forward the message.</p> <p>Customers can also provide a text message to be sent with the email offer. When they submit this form, Siebel Marketing generates a Forward to Friend response type record and sends a copy of the email to any email addresses that the customer provided. It then regenerates the Response Form links in the email for the new recipient's email address.</p>
One Click Unsub	Sets the Do Not Email check box on the contact profile and displays a confirmation message to the customer that states that they have been unsubscribed from all email offers.
Read Receipt	<p>Detects that the email message has been opened by the customer. The customer is not aware of this hidden event.</p> <p>This link is used only in HTML to embed a 1 x 1 pixel image in the email offer at the location where a response form is placed. If the recipient of the email offer opens the email, Siebel Marketing retrieves this image from the Email Marketing Server and updates the Message Open Timestamp in the campaign history table (S_CAMP_CON). The following list describes some ways a read receipt can be blocked:</p> <ul style="list-style-type: none"> ■ Newer email applications have preferences options that can prevent the display of embedded images. ■ Ports used to make the request for the image may be blocked at the recipient's firewall. ■ If you place the read receipt image in the HTML part of a multipart MIME email message and the recipient sets up their email application to read text emails only, the Read Receipt image request does not occur.

Table 23. Response Forms and Descriptions

Response Form	Description
Requested call back	Navigates customers to a Web page where they can provide contact information and from where your company can arrange a follow-up phone call.
Requested More Info	Navigates customers to a Web page where they can provide contact information and from where your company can send more information such as brochures or other collateral.
Requested Unsubscribe	Navigates customers to a Web page where they can enter communication preferences by channel. For more information, read Setting Up and Using Web Marketing on page 207 .
Subscribe to List	Navigates customers to a Web page where a confirmation message displays stating that they have been subscribed to the list. This response associates the contact or prospect ID of the respondent with a subscription list associated with the offer.
Unsubscribe from List	Navigates customers to a Web page where a confirmation message displays stating that they have been unsubscribed. Siebel Marketing generates an Unsubscribe from List response type record and removes their contact or prospect record from the subscription list associated with the offer.

Creating Activities for Contacts and Prospects

Siebel Marketing can create an activity for each contact and prospect in your mailing. If you enable this option, then Siebel Marketing uses the Email Marketing - Update Status workflow to create the new activities. The workflow is called after each wave batch sent. You can customize the workflow if needed. [Table 24](#) lists the workflow fields and the values used.

Table 24. Workflow Field Values

Workflow Field	Value
Account Id	accountId for the contact or prospect
Campaign Id	campaignId
Description	offerName
Done	current date
Opportunity Id	opportunityId
Status	Done
Type	Email - Outbound

To create activities for contacts and prospects for an email offer

- 1 While creating the Email offer, click the Advanced tab.
- 2 Check the Create Activity check box.

Previewing Offers

You can preview what an offer looks like when received by a contact or prospect in the following ways:

- **Click Verify and Preview in the appropriate Edit Template view.** Clicking this button previews the selected template and tests the behavior of conditional content to various merge field values. For more information, read the section in this chapter that applies to the template you are using.
- **Use the Test Offer feature.** This feature is one way to confirming configurations for email, fax, and wireless offers. For example, when you use this feature to test email offers you confirm configurations such as Email Marketing Server configuration and proper template setup for use in multipart MIME. For more information, read [Testing Campaigns That Have Email, Fax, and Wireless Offers on page 143](#).

Personalization Items

Personalization items are categories of supported embeddable object types. Depending on which item type you select, the Personalization Elements list contains the available elements for that item.

The available personalization items are:

- Events
- Merge Fields
- Product Catalog Items
- Related URLs
- Response Forms
- Web Offers
- Web Surveys

Merge Fields Personalization Item

Use merge fields to customize offers by contact or prospect. Contacts or prospects can have multiple fields associated with them, each field defining some attribute of a contact or prospect (for example, the person's last name, their first name, or their account number). For each unique contact or prospect, the value of these fields may differ. You insert the merge field personalization element in the text and then the value of the Contact or Prospect field is populated into the text where you inserted the merge field personalization item.

The following simple example shows two prospects with the first names of Sally and Fred, how the personalization item appears in the offer before and then after the contact or prospect field is populated.

Before population in the offer text:

Hello [Field: First Name]!

When Sally receives the offer, she gets the following:

Hello Sally!

When Fred receives the offer, he gets the following:

Hello Fred!

In some contact or prospect records, a value might not exist for a non-numeric merge field. For example, the database record from which the value comes is a NULL entry. When the contact or prospect field is populated, the merge field may default to one of the following values:

- **Empty string.** The value is an empty string (a string containing no characters).
- **Unspecified.** The value is the word Unspecified.

For Web offers, surveys, events, and URLs to be available as personalization elements Web Offers, Web Surveys, Events, and Related URLs categories, you must add the records to the Web Offers, Web Surveys Related Events, or Related URLs lists. For more information, read [About Associating Web Offers, Web Surveys, Events, and URLs with Offers on page 104](#).

You can insert any field from the Personalization Elements drop-down menu by selecting and inserting it into the body of the email message. For related information, read [About Using Hyperlinks \(HREF\) in Offer Templates on page 77](#).

For example you may want to personalize the offer with the contact's name, such as: Exciting Offer for [Field: First Name] [Field: Last Name].

Using the Merge Fields category, you would select the personalization element [Field: First Name] and insert it into the desired location in the message. You would repeat this procedure to add a last name. Typically, the tags for personalization elements are enclosed in brackets ([and]).

During run time, the target values are substituted for these personalization elements. The response forms, product links, Web offer links, and Web survey links are encoded so that they become URL links containing the destination address, with campaign, offer, and recipient codes included. Thus, the URL in any text-based email can become long. The following list contains guidelines for setting up personalization elements:

- The Merge Fields list is driven by your configuration. If you are using the advanced approach, merge fields can be extended using fields from the segmentation module. For more information, read [Using Merge Fields in Email Offers on page 92](#).
- The list of Merge Fields includes a calculated field called Current Date. This merge field is replaced by the Campaign Send Date when the campaign is launched.
- The Product Catalog Items are limited to those defined for the Product catalog page for the products associated with the offer.

- The list of Web offers is limited to those defined for this offer in the Related Web Offers list view tab.
- The list of Web surveys is limited to those defined for this offer in the Related Web Surveys view tab.
- The list of related events is limited to those events defined for this offer in the Related Events link bar. When you add a related event, you only display events with active dates and that have a status code of Executing or In Progress.
- Use related URLs to embed hyperlinks to offers and generic Internet Web pages in an offer. When a Contact or Prospect clicks this link, Siebel Marketing records a Campaign Response.
- Typically, response forms are Web forms that a contact or prospect can use to respond to an offer through the Web. The response forms for an email offer are Confirm Subscribe to List, Confirm Unsubscribe from List, Forward to Friend, One Click Unsub, Read Receipt, Request Call Back, Request More Info, Request Unsubscribe, Subscribe to List, and Unsubscribe from List.

Using Merge Fields in Email Offers

Your application can be configured to use email merge fields in the following ways:

- **Basic.** Provides a static set of merge fields based on the campaign recipient business component. These merge fields are available when your organization has not licensed or deployed the marketing segmentation module.
- **Advanced.** Provides a flexible set of merge fields based on data from any data source or table within the application. The merge fields in this case are controlled by the Personalization Format (Email Server list format) that you select for the email offer.

For instructions on configuring the Basic or Advanced modes for email personalization, read “Configuring Basic and Advanced Email Personalization” in the *Siebel Marketing Installation and Administration Guide*.

In the Basic configuration, each category has a number of personalization elements. For example, the Merge Fields category has the following personalization elements (depending on the personalization format used):

- [Field: M/M]
- [Field: First Name]
- [Field: Middle Name]
- [Field: Last Name]
- [Field: Account]
- [Field: Account Location]
- [Field: Job Title]
- [Field: Work Phone #]
- [Field: Home Phone #]
- [Field: Cellular Phone #]

- [Field: Fax Phone #]
- [Field: Email Address]
- [Field: Current Date]
- [Field: Source Code]

In the Offers screen, in the Advanced view tab, you need to select the appropriate personalization format for the email offer in the email offer form. When you create an email offer, the values for the Email Marketing Server and Personalization Format are set based on settings established by your administrator.

The default value for Personalization Format field is "Default Merge Fields". If the field value is not a path name, the available merge fields come from the Campaign Recipient business component user property. Otherwise, the columns in the report identified by the path are displayed in the Merge Fields picklist. You can change the default value for this field by using the Email Personalization Format server parameter for your object manager.

To select a Personalization Format (merge fields) for an email offer

- 1 Navigate to the Offers screen.
- 2 In the Offers list, click the name of the email offer.
- 3 In the Email Offer form, click the Personalization Format select button.
- 4 In the dialog box, select the appropriate format from the folders that appear.
For more information about creating Email Server formats, read *Siebel Marketing Installation and Administration Guide*.
- 5 In the Edit Email form, from the Personalization Items drop-down list, choose Merge Fields.
The merge fields should appear in the Personalization Elements list.

About Merge Fields in Email Offers

You can use merge fields in the body of a text or HTML email offer, in the same way that they are used within the text or HTML of other offer types. Additionally, merge fields may be used in the following areas related to email offers:

- **Subject Text field of the email offer.** The text to appear in the subject line of the email.
- **From Address parameter value.** A parameter of the Email Marketing Server in User Delivery Profiles.
- **Reply To Address parameter value.** A parameter of the Email Marketing Server in User Delivery Profiles.

About Creating Conditional Content

There are two personalization elements that can be used to generate conditional content within an email offer. Each of these is made up of the following personalization elements:

- **If-Then-Else.** Determines if a block of text or HTML should be removed from an outgoing email by verifying if a Merge field value is defined. The merge field is defined if it is NOT an empty string or, for numeric merge fields, if it is not a value of 0 (zero). For more information, read [If-Then-Else Personalization Element on page 94](#).
 - If the merge field is defined, the block of text or HTML remains in the outgoing email.
 - If the merge field is not defined, the block of text or HTML is removed from the outgoing email.
- **Named Blocks.** Used to decide whether or not to insert a block of text or HTML into an outgoing email by comparing one string to another. One string is compared to another to determine if the block of text or HTML is inserted. For more information, read [Named Blocks Personalization Element on page 96](#).
 - If the two strings are identical, the block is inserted.
 - If the two strings are not identical, the block is not inserted.

The components of these personalization elements must be placed in the correct locations in the text or HTML email offer or an error occurs.

If-Then-Else Personalization Element

Table 25 shows a list of If-Then-Else personalization element components.

Table 25. If-Then-Else Personalization Element Components

Personalization Element	Description
\$(else)	The Else component is used after a \$(if) or \$(elseif) component. When an analysis of a preceding \$(if) or \$(elseif) component results in the preceding block of text or HTML being removed from the outgoing email, the \$(else) component's block of text or HTML is not removed from the outgoing email. If the preceding \$(if) or \$(elseif) component does not remove its block of text or HTML, the \$(else) component removes its block of text or HTML.
\$(elseif [Field: FieldName])	The Else-If component is the same as the If component, except that it is used after the start of the If-Then-Else personalization element.

Table 25. If-Then-Else Personalization Element Components

Personalization Element	Description
<code>\$(endif)</code>	The End-If component closes the current If-Then-Else personalization element.
<code>\$(if [Field: FieldName])</code>	The If component is required to start an If-Then-Else personalization element. It determines if the merge field named [FieldName] has a value. If there is a value for [FieldName], the text between this If-Then-Else component and the next If-Then-Else component is not removed from the email.

The following is a simple example of the use of an If-Then-Else personalization element. If the first name is defined, the contact's or prospect's first and last name appears. If the first name is not defined, only the last name appears:

```
$(if [Field: First Name])
Dear [Field: First Name] [Field: Last Name],
$(else)
Dear Mr. or Mrs. [Field: Last Name],
$(endif)
```

Nesting If-Then-Else personalization elements (placing one within another) is an acceptable practice. The following is an example of nesting these elements:

```
$(if [Field: First Name])
  $(if [Field: Last Name])
    Dear [Field: First Name] [Field: Last Name],
  $(else)
    Dear [Field: First Name],
  $(endif)

  $(elseif [Field: Last Name])
    Dear Mr. or Mrs. [Field: Last Name],
  $(else)
    To whom It May Concern:
  $(endif)
```

Use of indentation indicates the nesting of one If-Then-Else personalization element within another. Indentation is not necessary, but makes it easier to read. Also, in this example, each component is on its own line. This use of separate lines is also not necessary, but it makes reading the offer easier.

After the Email Marketing Server makes the decision about what text or HTML to remove, the If-Then-Else personalization element components are also removed (including their trailing line breaks).

To insert if-then statements

- 1** Navigate to the Offers screen.
- 2** In the Offers List, click an email offer.
- 3** Select a template to edit.

- 4 If the If-Then-Else toolbar is not displayed, right-click in the toolbar area and select it.
- 5 In the primary menu, choose If.
- 6 In the secondary menu, choose a merge field to be personalized.
- 7 In the tertiary menu, choose a conditional operator.
- 8 Enter the value of the merge field to be personalized.
- 9 Select a location in the template to insert the personalized If statement.
- 10 Click Insert Rule.
- 11 Place the conditional content between \$(if) and \$(endif) tags.
- 12 (Optional) Add \$(elseif) conditions if more than one iteration of the content should appear.
- 13 Place default content after the \$(endif) tag.

Named Blocks Personalization Element

Table 26 shows a list of Named Blocks personalization element components.

Table 26. Named Blocks Personalization Element Components

Personalization Element	Description
\$(DefineBlock "MatchString")	Define Block component. Starts a block of text or HTML that is inserted in place of an Insert Block component when MatchString is identical to the MatchString of the Insert Block component.
\$(EndBlock)	End Block component. Ends a block of text or HTML started with the Define Block component.
\$(InsertBlock "MatchString")	Insert Block component. A block of text or HTML is inserted at the location this component is placed when MatchString is identical to the MatchString of a Define Block component. This comparison is case sensitive.

NOTE: The string comparison is case sensitive.

The following is a simple example of the use of a Named Blocks personalization element:

```
<P>The temperature of your favorite drink is $(InsertBlock "[Field: Favorite
Drink]").</P>
$(DefineBlock "Coffee")
<B>hot</B>
$(EndBlock)

$(DefineBlock "Iced Tea")
<B>cold</B>
$(EndBlock)
```



```
$(DefineBlock "water")
<B>cool</B>
$(EndBlock)
```

In this example, the merge field named Favorite Drink is the value Coffee. After the merge fields are populated, the following sentence appears:

The temperature of your favorite drink is hot.

The HTML source reads:

```
<P>The temperature of your favorite drink is <B>hot</B>.</P>
```

If there is no match for an Insert Block component match string, then the Insert Block component is not replaced by any text or HTML. After the Email Marketing Server resolves all matches, the remaining Named Block personalization element components are removed (including their trailing line breaks and any text or HTML between Define Blocks and End Blocks).

NOTE: The Define Block and End Block components may be placed within the HTML HEADER tags. This placement can make the email offer more readable.

To insert named blocks

- 1 Navigate to the Offers screen.
- 2 In the Offers List, click an email offer.
- 3 Select a template to edit.
- 4 If the If-Then-Else toolbar is not displayed, right-click in the toolbar area and select it.
- 5 In the primary menu, choose Insert Block.
- 6 In the secondary menu, choose a merge field.
- 7 In the secondary menu, choose a merge field to be personalized.
- 8 Select a location in the template to insert the block.
- 9 Click Insert Rule.

This inserts the block to be personalized. You need to define the values that have personalized content.

To set values for personalized content

- 1 In the primary menu, choose Create Block.
- 2 Enter the value of the personalized element to be linked to this block.
- 3 Click in the workspace after previously inserted Insert Block statement.
- 4 Click Insert Rule.
- 5 Place conditional content between `$(DefineBlock "merge field")` and `$(EndBlock)` statements.

About Applying Localization Rules to Offers

Each offer record contains a locale value. The locale is used to locate and display the localized landing page for response forms. When you create an email offer record, the locale value defaults to the value set in your profile. You can change the value to match your business needs. When you launch the campaign, the locale assigned to the email offer is used for all recipients.

The default character set for emails is UTF-8. This is the value set in the Charset attribute for the email's Content-Type header. To change the Charset attribute, select an Email Marketing Server profile with the correct Charset attribute or request a Administrator to make the changes necessary to the Email Marketing Server profile that you use.

NOTE: Internally, templates are maintained using the UTF-8 character set. Therefore, the character set should be able to represent characters for any written language.

The character set for the template you upload should be the default character set configured for the operating system you are using (the current code page on Windows or UTF-8 on UNIX). On UNIX platforms, an environment variable (SIEBEL_FILE_ENCODING) can be assigned to a character set to use in place of UTF-8 when reading templates. If the original template file contains a BOM (Byte Order Mark), the character set of the template file can be detected. This detection is useful when the character set differs from the platform default character set.

CAUTION: Be careful when using a character set for outgoing email that differs from the platform default character set or UTF-8. If the Email Marketing Server character set is not compatible with the character set of the original template file that is read from disk, the resulting email text may be unreadable.

About Fax Offers

Fax offers are available in Siebel Marketing and Siebel Campaigns. Using the Fax Offer view, a marketer can create personalized faxes for targeted distribution during a campaign.

The Fax Offer view contains the following view tabs:

- **Offer Details.** This form contains additional fields that you can use to specify a predefined communications Delivery Profile for fax distribution, an Activity check box that may be used to track the offer as an activity and approval check boxes and fields if the fax offer requires approval from your company's marketing and legal departments. The Offer Details form also displays a unique identifier for the offer in the Offer Code field.
- **Edit Fax.** Use this form to choose an offer template and specify the personalization elements that are included in your fax design.
- **Delivery Profile.** This read-only list displays parameters of the Siebel Communications profile chosen for the fax offer. For more information on setting up a delivery profile for a fax offer, read *Siebel Communications Server Administration Guide*. For more information on testing and distributing fax campaigns, read [Testing Campaigns That Have Email, Fax, and Wireless Offers on page 143](#).
- **Literature.** This list shows the company and product information associated with the media offer. You can add additional items to this list if desired. For more information, read [Associating Literature with Offers on page 111](#).

- **Related Events.** Displays events related to fax offers.

Process of Working with Fax Offers

To set up fax offers, perform the following topics:

- [Associating Templates with Fax Offers on page 99](#)
- [Creating Delivery Profiles and Associating with Fax Offers on page 100](#)

Related Topics

- [Creating, Modifying, and Associating Products with Offers on page 72](#)
- [Delivery Profiles for Fax Offers on page 99](#)

Associating Templates with Fax Offers

This section describes how to associate a template with a fax offer. To edit the template, read [About Creating and Editing Offer Templates on page 75](#).

To associate an offer template with a fax offer

- 1 Navigate to the Offers screen > Fax Offers view.
- 2 In the Fax Offers list, select the fax offer, and click the Edit Fax view tab.
- 3 In the Edit Fax form, create a new record.
- 4 Click the Template Name select button.
- 5 In the Pick Offer Template dialog box, select the predefined template for the fax offer, and click OK.

Only offer templates that you add to the Offer Templates list are available for selection. For more information, read [About Creating and Editing Offer Templates on page 75](#).

- 6 Save the record.

The template contents appear on the right side of the view, and Edit Template and Verify & Preview buttons become available.

Delivery Profiles for Fax Offers

Delivery Profiles are available in Siebel Marketing. They are required for fax offers. Delivery Profiles are created using the Communication Administration screen's Communications Drivers and Profiles view. Fax offers are distributed using the fax communications driver provided with your fax application.

Siebel Communications Server does not interface directly with fax servers. Most popular fax servers provide email gateways that connect themselves to an email server such as Microsoft Exchange Server or an SMTP server. The host email server recognizes messages with specially formatted email addresses and directs those messages to the fax server.

Siebel Communications Server interfaces indirectly with this type of fax server through the host email server. Except for the email address format, it makes no difference to Siebel Communications Server whether it is sending an email or a fax. Before fax offers can be sent out, you must select one of the defined profiles.

Default parameter values are set for each communications driver within the Communication Administration screen's Communications Drivers and Profiles view. You can create customized communications profiles for each of these driver types that override the default values for that driver. For example, a profile might specify customized From and Reply-To email addresses.

For more information about communications drivers and profiles, read *Siebel Communications Server Administration Guide*.

For more information about using delivery profiles, read [Creating Delivery Profiles and Associating with Fax Offers on page 100](#).

Creating Delivery Profiles and Associating with Fax Offers

Use this section to select a communications driver and create a profile for fax offers and then associate that profile with a fax offer.

To create a delivery profile for fax offers

- 1** Navigate to the Administration-Communications > Communications Drivers and Profiles view.
- 2** In the Communications Drivers list, select a driver, and click the Profiles view tab.
- 3** In the Profiles list, create a new record:
 - a** In the Name field, enter a name for the new profile.
 - b** In the Organization field, accept the default organization, or click the select button to select another organization.
 - c** In the Responsibilities field, click the select button, and in the Responsibilities list, select the responsibility associated with profile access.

The Responsibilities field is used in conjunction with Siebel eMail Response. It does not apply to outbound email campaigns.
- 4** Save the profile, and click the Driver Parameters view tab.
- 5** Edit the parameters for the profile, and save the record.

To associate a delivery profile with a fax offer

- 1 Navigate to the Offers screen.
- 2 From the Offers link bar, select Fax Offer.
- 3 In the Offer Details form, select the offer record.
- 4 In the Delivery Profile field, select the delivery profile for the offer.

Web Offers

Web offers are targeted HTML offers that can be displayed on the Siebel Web Marketing microsite. Web offers are available in Siebel Marketing and Siebel Web Marketing.

Using the Web Offers view tabs, you can specify a template containing content for the Web Offer, edit the template and add personalization elements, identify links to related Web offers, surveys, related events and related URLs and attach relevant product information that can be downloaded by the Web site visitor. [Table 27](#) shows the view tabs available in the Web Offers view.

Table 27. Web Offers View Tabs

View Tab Name	Description
Offer Details	<p>This form contains additional fields that you can use if the Web Offer requires approvals from your company’s marketing and legal departments. It also provides a unique identifier for the offer in the Offer Code field.</p> <p>NOTE: If you select the Inbound Active Flag check box, the Web Offer appears to eligible users in the Web Marketing home page. The Featured Offers applet checks this flag before displaying a Web offer to an eligible contact or prospect.</p>
Edit Web Offer	<p>Use this form to attach templates containing the content of the Web offer. To be selected here, templates must first be added to the Offer Templates list. For more information, read About Creating and Editing Offer Templates on page 75.</p> <ul style="list-style-type: none"> ■ Use the HTML editor to edit the template content as well as select personalization items and insert items into the template. ■ Click the Verify & Preview button to verify the template edits and display the finished Web offer as it appears on the Web page.
Downloads	<p>Use this list to provide a list of literature related to the offer that is available for download by the Web site visitor.</p>
Advanced	<p>Contains the Related Web Surveys, Related Events, and Related URLs link bars. Use these lists to specify Web surveys, related events, and related URLs that you can embed in your Web offer, using the Edit Web Offer personalization elements controls. For more information, read About Associating Web Offers, Web Surveys, Events, and URLs with Offers on page 104.</p>

The following topics detail how to create a basic Web offer:

- [Associating Templates with Web Offers on page 102](#)
- [Adding Attachments to Web Offers Downloads List on page 102](#)

Related Topic

[Creating, Modifying, and Associating Products with Offers on page 72](#)

Associating Templates with Web Offers

This section describes how to associate a template with a Web offer. To edit the offer template, read [About Creating and Editing Offer Templates on page 75](#). Templates must first be added to the Offer Templates list to be available for selection in the Edit Web Offer view tab. For more information, read [About Creating and Editing Offer Templates on page 75](#).

To associate an offer template with a web offer

- 1 Navigate to the Offers screen > Web Offers view.
- 2 In the Web Offers list, select the offer, and click the Edit Web Offer view tab.
- 3 Create a new record.
- 4 Click the Template Name select button.
- 5 In the Pick Offer Template dialog box, select the template, and click OK.

To be available for selection, templates must first be added to the Offer Templates list. For more information, read [Creating Offer Templates and Adding to the Template List on page 76](#).

- 6 Save the record to associate the template with the offer.

Adding Attachments to Web Offers Downloads List

The Web Offer Downloads list displays literature and other files that can be downloaded with the offer. Literature items must be included in the literature list to be available for selection in this view.

The Downloads list shows files that can be included in the selected Web offer for download. Any literature other than offer templates can be included in an offer as a download.

The fields in this view are shown in [Table 28](#).

Table 28. Fields in the Web Offer Downloads View

Field	Comment
Comments	Populated from the literature table.
Description	Populated from the literature table.

Table 28. Fields in the Web Offer Downloads View

Field	Comment
File Name	Populated from the literature table.
File Type	Populated with the file extension.
Modified	Populated with the file modification date.
Name	Click the Name select button to select a literature item.
Release Date	Populated with the date that the literature item was released.
Size (In Bytes)	Populated with the file size in kilobytes.

Files added here are not yet available for downloading. In this view, you select a set of files to be able to include as downloads from your Web offer. These files then appear in the Personalization Elements list of embeddable objects in the HTML Editor tool bar when you choose Downloads from the Personalization Items list.

You can select any file from that list and copy it into the template file and that file becomes available for downloading. These files are displayed in the Embedded Object list as [Download:Literature Item Name].

When the Siebel Marketing software encodes this tag, it uses the Literature Item Name as the hyperlink text. The marketer can override this default behavior by using the wildcard (*) functionality and manually defining the HREF link, as described in [About Using Hyperlinks \(HREF\) in Offer Templates on page 77](#).

To attach literature in the Downloads view

- 1 Navigate to the Offers screen > Web Offers view.
- 2 In the Web Offers list, select the offer, and click the Downloads view tab.
- 3 In the Downloads list, select the literature to make available for downloading from the Web offer:
 - a Click the menu button and create a new record.
 - b In the Downloads form, click the Name select button.
 - c In the Pick Literature Item list, select the item, and click OK.

About Associating Web Offers, Web Surveys, Events, and URLs with Offers

Through Siebel Marketing and Siebel Web Marketing, you can associate Web offers, Web surveys, Events, and Related URLs with offers. [Table 29](#) shows which offer elements can be used with each channel.

Table 29. Available Channels for Offer Elements

Related Offer Element	Available Channels
Downloads	Web offers
Related Events	All offer channels
Related URLs	Email offers, Web offers
Related Web Offers	Email offers, Web Offers
Related Web Surveys	Email offers, Web offers

You can, however, relate the same Web offer to more than one email offer. For example you may have a Web Offer and want to associate that Web offer with multiple email offers. In this case, each of these email offers has a link to that same Web offer.

Related Web Offers, Related Web Surveys, Related Events, and Related URLs links

In the Advanced tab link bar, use the Related Web Offers, Related Web Surveys, Related Events, and Related URLs links to add each offer element to the appropriate offer. After you add an element to the list, it is available as a personalization element in the appropriate Offer. For example, after you add a Web offer on the Related Web Offers link bar, you can navigate to an Edit view and select Web Offers in the Personalization Items tool bar. Your newly added Web offer appears in the list of elements.

When the Web site visitor clicks a Web survey link on the Offers or Information views, a survey wizard appears that steps the visitor through a series of questions about the product. You can use Web Surveys to capture customer feedback or qualify leads. Using the Web Survey designer, you can design a survey once, reuse questions and answers across multiple surveys, and deploy the survey on the Web and in the Call Center. The hyperlink takes the customer to a predefined Web survey page.

NOTE: Web Surveys are created using Siebel SmartScript. For more information, read *Siebel SmartScript Administration Guide*.

The Related Web Surveys list contains a list of Web surveys related to this campaign that can be included in Web Offer page as URL hyperlinks. To display the SmartScript Administration screen's Scripts list where you can select and modify the survey, click the survey name in the Related Web Surveys list.

The following list contains descriptions of how links to offer elements appear in an offer:

- **Web offer link.** The following is an example of how a link to a Web offer appears in an offer. The hyperlink is the image (banner_midsize.gif). When you click the link, the Web offer (Introducing Diet Vanilla Cake) appears.

```
<a href="[*web Offer: Introducing Diet Vanilla Cake]"></a>
```

- **Event link.** The following is an example of how a link to an Event appears in an offer. The hyperlink is Click Here. When you click the words Click Here, the specific Event appears.

```
<a href="[*web offer: Introducing Diet Vanilla Cake]">Click here</a>
```

- **Web survey link.** The following is an example of how a link to a Survey appears in an offer. The hyperlink is the image (customer_survey.gif). When you click the image, the specific survey appears.

```
<a href="[*web Survey: Diet Vanilla Cake Survey]"></a>
```

- **Related URLs link.** The following is an example of how a link to a related URL appears in an offer. The hyperlink is Click Here. When you click the words Click Here, the specific URL appears, showing any specified data elements.

```
<a href="[*Related URL: DVC URL]">Click here</a>
```

- **Products link.** The following is an example of how a link to a Product URL appears in an offer. The hyperlink is the image (order_now.gif). When you click the image, the specific product page appears.

```
<a href="[*Product: Diet Vanilla Cake]"></a>
```

Associating Web Offers, Web Surveys, Events, and URLs with Offers

Use the following procedure to associate Web offers, Web surveys, Events, and Related URLs with offers.

To associate Web offers, Web surveys, Events, and Related URLs with offers

- 1 Navigate to the Offers screen.
- 2 In the Offers link bar, choose the offer type to associate with an offer element.
- 3 In the selected offers list, click the offer name.
- 4 Click the Advanced view tab for the Web offer or offer element to associate with the selected offer.

- 5 In the selected list, create a new record.

NOTE: Related URLs must start with `http://` or the Web server address is inserted. If you have more than one URL, separate each one with a semicolon (;) and no spaces.

- 6 In the add dialog box, select the Web offer or offer element, and click OK.

Creating Other Offer Types

You can create other offer types, such as direct mail, media offers, phone, and wireless, depending on the application you use:

- [Contact Call Offers on page 106](#)
- [Direct Mail Offers on page 107](#)
- [Media Offers on page 107](#)
- [Phone Offers and Direct Sales Offers on page 108](#)
- [Wireless Offers on page 109](#)

Contact Call Offers

Contact call offers are available in Siebel Pharma Marketing and Siebel Pharma Campaigns only. Contact call offers are executed through the Siebel Pharma sales application. Use the Contact Call offer view to define specific product messages to be delivered as part of pharma call detailing. The contact call offer view consists of the following view tabs:

- **More Info.** This form contains fields that you use if the contact call offer requires approvals from your marketing and legal departments. It also provides a unique identifier for the offer in the offer code field.
- **Response Templates.** Use this list to create potential responses to the product message created as part of the contact call offer. For instructions on how to create response templates, read [Associating a Response Template to a Contact Call Offer on page 107](#).

For instructions on executing contact call offers, read the topic on Recording Marketing Responses in Contact Calls in *Siebel Life Sciences Guide*.

To create a Contact Call offer

- 1 Navigate to the Offers screen.
- 2 In the Offers list, create a new offer.
- 3 From the Channel drop-down list, choose Contact Call.
- 4 In the Offers list, complete the remaining fields.

For more information about creating offers, read [Creating, Modifying, and Associating Products with Offers on page 72](#).

- 5 Click the Contact Call offer name.

- 6 In the More Info tab, complete the fields.

Associating a Response Template to a Contact Call Offer

Response templates associated with a contact call offer determines the choice of responses that can be recorded as part of call reporting in Siebel Pharma.

To associate a response template to a contact call offer

- 1 Navigate to Offers screen.
- 2 From the Offers link bar, select Contact Call Offers.
- 3 Click the offer name.
- 4 In the Response Template list, create a new record.

Direct Mail Offers

Direct mail offers are available in the Siebel Marketing application. For instructions about how to create a direct mail offer, read [Creating, Modifying, and Associating Products with Offers on page 72](#).

Using the Direct Mail Offer view, you can associate Literature documents with an Offer. Siebel Marketing does not provide a mechanism to print direct mail offers but can pass output lists to vendors for execution.

You can generate output or distribution list of contacts during the campaign launch. The customer information is arranged according to a predefined list format, and the list can be delivered to the appropriate vendors through a predefined method (for example, FTP or email). For more information about list output and vendors, read [About Previewing and Generating Lists on page 160](#).

The Direct Mail Offer contains the following view tabs:

- **Offer Details.** This form contains additional fields that you can use if the Direct Mail Offer requires approvals from your company's marketing and legal departments. It also provides a unique identifier for the offer in the Offer Code field.
- **Literature.** This list shows the company and product information associated with the offer. To add literature to the list, read [Associating Literature with Offers on page 111](#).
- **Related Events.** Displays events related to direct mail offers.

Media Offers

Media offers are available in Siebel Marketing and Siebel Campaigns. For instructions about how to create a media offer, read [Creating, Modifying, and Associating Products with Offers](#).

Use the Media Offers view to define indirect offers. Types of media offers available in the standard product are Billboard, Print Ad, Press Release, Radio, TV, Seminar, and Trade Show. When you define indirect offers, you know the general characteristics of your audience but not its exact composition.

The Media Offers view contains the Offer Details, Literature and Related Events view tabs.

- **Offer Details.** This form contains additional fields that you can use if the media offer requires approvals from your company’s marketing and legal departments. It also provides a unique identifier for the offer in the Offer Code field. You can specify the type of media to use to distribute the offer using the Type field.
- **Literature.** This shows the company and product information associated with the media offer. You can add additional items to this list if desired. For example, if the media offer type is press release, you can associate the press release content with the offer for later referral. For more information, read [Associating Literature with Offers on page 111](#).
- **Related Events.** This indicates if the media offer is being used to promote a specific event or set of events.

Phone Offers and Direct Sales Offers

Phone offers and Direct Sales Offers are available in Siebel Marketing and Siebel Campaigns.

Use the Phone Offers view or Direct Sales Offers view to define telemarketing offers to be executed using Siebel Call Center or another application. [Table 30](#) shows the view tabs in the Phone Offers view.

Table 30. Phone Offers View Tabs

View Tab Name	Description
Offer Details	This form contains more fields that you can use if the phone offer requires approvals from your company’s marketing and legal departments. It also provides a unique identifier for the offer in the Offer Code field.
Literature	This list shows the company and product information associated with the phone offer. You can add additional items to this list if desired. For more information, read Associating Literature with Offers on page 111 .
Related Events	Displays events relating to phone offers.
Advanced	This form associates an Offer Group with the phone offer. This tab is not available in the Direct Sales Offers view.

Creating Call Guides for Phone Offers

A call guide is a read-only note field visible to call center agents as they launch campaigns. The information in the Call Guide field is useful to agents as they prepare for inbound and outbound telephone calls and when they talk to clients. You create the call guide in the Offers screen.

The Call Guide field is intended to display more detailed information about the campaign, answer common questions, and provide offer options. The following example shows what a Call Guide field may contain:

Call Guide Example

Through the end of December, we are offering a special bonus to our current customers upgrading a Basic service agreement to Premium. For \$149, we upgrade your service package as well as provide a coupon book worth \$1,000 toward the purchase of our Signature brand of products.

If the customer agrees, the call center agent can click the Script button, and start the call script.

NOTE: A call script is written using Siebel SmartScript. You associate a script with a campaign. For more information, read [Using SmartScripts with Campaigns on page 125](#). For more information about creating SmartScripts, read *Siebel SmartScript Administration Guide*.

To create a call guide

- 1 Navigate to the Campaigns screen.
- 2 In the Campaigns list, select a campaign.
- 3 Click the campaign name.
- 4 Click the Design view tab.
- 5 In the Call Guide text field, enter the information to use for the offer.

Wireless Offers

Use the Wireless Offers view to create text messages that can be delivered through SMS as part of a campaign. Wireless offers can be sent to any contacts who are associated with the campaign and who also are associated with mobile device addresses. Wireless offers cannot be sent to prospects.

To create a wireless offer

- 1 Navigate to the Offers screen.
- 2 In the Offers list, create a new offer.
- 3 From the Channel drop-down list, choose Wireless Message.
- 4 In the Offers list, complete the remaining fields.

For more information about creating offers, read [Creating, Modifying, and Associating Products with Offers on page 72](#).

- 5 Click the wireless offer name.
- 6 In the Edit Wireless Message view tab, in the Personalization Elements list, verify that the merge fields appear.
- 7 Click Edit Message to add the text of the message.
- 8 You can insert the merge field tag where you want the merge field to be located in the body of the message by performing the following steps:
 - a In the Personalization list, copy a merge field tag to insert in the message.
 - b In the Message Contents workspace, paste the tag in the message contents box.
- 9 Click Save Message to save the message text.

Monitoring the Status of Wireless Offers

The Status field in the Campaign Contact views provides the status of different types of offers that have been presented to campaign contacts and prospects. After wireless offers are sent to campaign contacts, the application can track whether or not the wireless offer was successfully delivered. Some additional configuration is required to enable such tracking of wireless offer.

Two workflow policies exist to track the status of wireless offers: Campaign Offer Message Tracking - Delivered and Campaign Offer Message Tracking - Failed. When the wireless carrier sends a message back to the application with information about the success of delivery, the Status field for that Campaign Contact is updated from Sent to either Delivered or Failure, based on whether or not the wireless message was successful.

To set up wireless offer tracking

- 1 Verify that the Communications Management and Workflow Management server components have been successfully started.
- 2 Create a new Response Group to receive confirmation messages from wireless carriers about whether the wireless message was successfully delivered or not:
 - a Navigate to Administration - Communication > All Response Groups.
 - b Create a new Response Group with the Service Name set to Workflow Process Manager and Method Name set to RunProcess.
 - c Click the Input Arguments tab and create a new record with Name set to ProcessName and Value set to Inbound Wireless Messaging Activity Dispatch.
 - d Click the Profiles tab and create a new record for each Wireless Profile that is being used to send out Wireless Offers to Campaign Contacts.
 - e In the Response Groups list, pull down the menu and choose Submit Response Group Changes.
- 3 Activate the Inbound Wireless Messaging Activity Dispatch Workflow Process:
 - a Navigate to Administration - Business Process > Workflow Deployment.
 - b In the Active Workflow Processes list, query for the Inbound Wireless Messaging Activity Dispatch record.

- c If the record does not exist, query for it in the Repository Workflow Processes list, then click Activate.
 - d Verify that the Status for this record is Active.
If it is not active, click Revise, then click Activate for the new record.
- 4 Create a database trigger based on the Campaign Offer Message Tracking - Delivered and Campaign Offer Message Tracking - Failed Workflow Policies.
- a Start the Generate Triggers task.
For example, run the following command, substituting your database username and password:

```
start task for comp gentrig with PrivUser=[database username],  
PrivUserPass=[database password], EXEC=true.
```
 - b Verify that the trigger gets successfully created by looking for a status of Completed when you run the following command:

```
list task for comp gentrig
```
 - c Verify that the trigger was successfully created by reading the trigger.sql file.
At the top of this file you should find a generate trigger statement on the S_CM_MSG_TRACK table.
- 5 Start the Workflow Monitor task for the 'Marketing' Workflow Policy Group by running the following command:

```
start task for comp workmon with GroupName='Marketing'
```
- 6 Verify that the task was successful by looking for a status of Sleeping for ... when you run the following command:

```
list task for comp workmon
```

If you change the Workflow Policy in the application, you need to remove the trigger and create a new one. You can do this by executing the following commands, for example:

```
start task for comp gentrig with PrivUser=[database username],  
PrivUserPass=[database password], EXEC=true, remove=true  
  
start task for comp gentrig with PrivUser=[database username],  
PrivUserPass=[database password], EXEC=true
```

Associating Literature with Offers

Literature about the products or services offered during a campaign can be associated with an offer using the Literature view tab in the Direct Mail, Media, Phone, and Fax Offer views. To add attachments to email offers, read [Editing Offers on page 84](#).

You can associate literature items, such as white papers, presentations, brochures, advertising material, and product specifications with your offer to create a specialized library of information. You can use this library when reviewing details of offers that are being reused in current campaigns.

In addition, a call center agent can view the literature while launching the campaign. The agent can also include literature items with faxes, email messages, or correspondence sent to a contact. Literature items are then included when you create a new correspondence record for a contact.

Before you can select literature to associate with an offer, you must add the literature items to the Literature screen's All Literature Across Organizations list. For more information about adding literature that you can associate with your offers, read the chapter about literature in *Applications Administration Guide*.

Use the following procedure to associate specific literature items with your offers.

To associate a literature item with an offer

- 1** Navigate to the Offers screen.
- 2** From the Offers link bar, select the appropriate offer type.
- 3** Click the offer name.
- 4** In the Literature list, create a new record.
- 5** In the Literature form, click the Name select button.
- 6** In the Pick Literature Item dialog box, select the literature, and click OK.

7

Planning and Designing Marketing Campaigns

The processes and other topics in this chapter show you how to design marketing campaigns that meet your business needs.

This chapter contains the following sections:

- [About Siebel Campaigns on page 113](#)
- [Process of Planning and Designing Marketing Campaigns on page 114](#)
- [Process of Setting Up Campaigns on page 118](#)
- [Process of Setting Up Teams and Groups on page 127](#)
- [Process of Setting Up Campaign Execution Options on page 129](#)
- [Process of Setting Up Campaign Quotas on page 135](#)
- [Process of Setting Up Campaign Assignment Skills on page 139](#)
- [Using Siebel Marketing with Siebel Events Management on page 141](#)
- [Testing Campaigns on page 142](#)
- [About Using Response Management on page 143](#)
- [Reviewing and Adding Campaign Elements in Campaign Explorer on page 153](#)
- [Process of Loading Customers in Campaigns on page 153](#)

About Siebel Campaigns

The Siebel Campaigns module is available to users with a license for Siebel Marketing or Siebel Campaigns.

A *campaign* is the initiative in which you convey a marketing message to one or more groups of people. Typically, campaigns deliver a promotional offer to retain current customers or to acquire new customers across channels of communication. For example, you may launch a phone campaign that invites contacts to sign up for a special promotion or deliver a direct mail campaign that provides a sample of a new product and a coupon offer to existing customers.

The goal of a marketing campaign is to create an opportunity that ultimately results in a sale, brand recognition, or some other type of response. Marketers use both direct and indirect campaigns to achieve these objectives.

- Direct campaigns target individuals using multichannel approaches such as email and telephone. Contacts for the campaign are derived by applying segmentation criteria against a database of customer information and generating a list or by purchasing or renting a list of prospects. Multiple campaigns can use the same segment criteria.

- Indirect campaigns target indeterminate groups of people whose general characteristics you may know, but whose exact composition you do not know. Examples of indirect campaigns are those that use television, radio, print ads, or other forms of media for delivery of the message. An indirect campaign is associated with a marketing program's stage rather than with a specific segment or list.

The Siebel Campaigns module is used by Siebel Business Applications such as Call Center and Sales. The campaigns are the same as the campaigns that result from a campaign in the marketing application. Campaigns contain contacts and prospects, offers, activities, and other campaign execution elements.

Using Siebel Campaigns you can distribute your company's offer using television, radio, billboards, direct mail, fax, email, the Web, wireless, and phone.

The campaign creation process begins with an administrator, who creates the offers and associates the offers with a campaign. The administrator then adds the literature, contacts and prospects, call summary, and call guide. The administrator also determines which script, if any, is associated with the campaign and who is on the campaign team. A campaign manager may associate quotas and incentive awards with the campaign to track progress and reward performance.

The administrator can monitor the status of campaigns using the Campaign Explorer view to display the Contacts, Activities, Offers, and Literature for each campaign, and by using Campaign and Response Charts.

Process of Planning and Designing Marketing Campaigns

Siebel Marketing's program and campaign organizational tools manage activities, documentation, milestones, and schedules for your marketing campaigns including:

- 1 [Creating Activity Templates on page 115](#)
- 2 [Associating Activity Plans with Programs and Campaigns on page 116](#)
- 3 [Associating Documents with Programs and Campaigns on page 118](#)
- 4 [Viewing Timelines on page 117](#)

About Creating and Using Activity Plans

Siebel Marketing's Activity Plans views associate predefined planning and milestone activities and tasks with a template (activity plan). Then, you can assign the templates to your marketing programs and campaigns. This assignment creates one or more activities that are associated with a campaign or a program.

NOTE: Activities are not created for contacts loaded into a campaign.

Activity Plans may be designed to help you plan the marketing program or campaign, or launch it. Before you link an activity plan to your campaign, you need to create activity templates or customize existing templates to reflect your business process and needs. Use templates to define a generic set of activities that may be reused.

For example, a marketing department production manager may design an activity plan template called Direct Mail that contains regularly scheduled campaign activities such as meetings with creative or budgetary staff and start tasks. Using the Campaign Activity Plans view the manager can associate the activity plan template to the current campaign and then assign resources, define priorities and status and so on to each predefined task, adding comments where necessary.

The activity plan record is flagged to indicate how the activity plan is to be used. If the activity is designated as a planning task, none of its activities are copied to the campaign record when it is created. If the activity plan is designed for the execution of the program or campaign, select the Recurring check box, and the set of activities are recreated and associated with each occurrence.

If your marketing program or campaign has a mixture of planning and start activities, create two plans—one for planning and one for execution tasks—and assign them both to the program or campaign.

Creating Activity Templates

Use Activity Plan Templates to create and manage activities for programs and campaigns. You define templates using the Application Administration screen's Activity Templates and Activity Template Details views.

A campaign's activity plan template may include information on the type of activity, duration and status, a list of activities associated with the program or campaign (preparation, telephone calls, milestones, tasks), and so on.

To create an activity plan template

- 1** Navigate to the Administration - Data screen > Activity Templates view.
- 2** In the Activity Plan Templates list, create a new record.
- 3** In the Template form, complete the fields and save the record.
 - a** Enter a name for the template.
 - b** In the Type drop-down list, choose Program Container for a marketing program template, and Campaign as an activity template for campaigns.
 - c** Enter a template description.
 - d** In the Auto Trigger field, select the check box if the activity should be associated with the occurrence level.
 - e** Select the Public check box if the activity plan may be used by others not on your team.

To create activities for the template

- 1** Navigate to the Administration - Data screen > Activity Templates view.
- 2** In the Activity Plan Templates list, select a template.
- 3** Click the Activity Template Details view tab.
- 4** In the Activity Template Details list, create a new record.

- 5 Complete the necessary fields for each activity assigned to the template.
- 6 From the Type drop-down list, choose an activity type.
NOTE: Repeat Step 2 through Step 6 to add activities to the template.
- 7 Save the activity.

Associating Activity Plans with Programs and Campaigns

Use the Campaigns or Programs screen's Activity Plans view to associate a template containing predefined activities with a program or campaign. An Activity Plan Template's type must be set to Program Container for marketing programs or Campaign for marketing campaigns to be available for selection.

The Activity Plans view has the following elements:

- The Campaign or Program form, which provides details of the selected campaign or program.
- The Templates list, which can contain one or many activity plan templates.
- The Activities list, which displays activities associated with the selected template.

To associate an activity plan and activities with a campaign or program

- 1 Navigate to the Campaigns or Programs screen.
- 2 In the Campaigns or Programs list, click the campaign name or program name.
- 3 Click the Plan view tab.
- 4 In the Plan link bar, click Activity Plans.
- 5 In the Activity Plans list, create a new record.
In the new row, the Recurring field contains a check mark.
- 6 Complete the necessary fields:
 - a From the Template drop-down list, select a predefined template.
 - b Edit the existing description if desired, or enter a description of the plan.
 - c Select Suppress Calendar to populate the check box if you do not want these activities added to your calendar view.
 - d Clear Recurring if the activity should be not be written to the campaign record for every occurrence of the campaign or program.

When you clear the Recurring check box, you indicate that this set of planning tasks is only performed once across all occurrences. By default, each new activity plan is set to Recurring when you assign it to a campaign or activity.

A list of activities appears in the Activities list. Note that the dates are populated by using the Lead Time column relative to the time that the activity template was associated.

- 7 To change the times or dates of any of the activities, click the Schedule view tab for the campaign
- 8 In the Schedule link bar, click Activity List.

Viewing Timelines

Timelines are available for programs, campaigns, event plans, and events. Timelines provide calendar views of scheduled, active, and completed marketing tactics in a Gantt chart format. The chart is divided into weeks and months. Start field and End field values determine the placement of the timeline bars. Timelines help you determine that scheduling is appropriate and on track for planned marketing efforts. Timeline bars are color-coded to help you identify the status of programs and campaigns. You can place the cursor over a timeline bar to display more details. [Table 31](#) shows the Timeline types that appear in the link bar of the Marketing Calendar screen

NOTE: If you cannot view color indicators, refer to *Siebel Business Applications Accessibility Guide* for assistance.

Table 31. Marketing Calendar Timeline Types

Timeline Type	Description
Tactics timeline	Shows active, completed, and planned marketing tactics including campaigns, events, event plans, and programs. You can click the name of any tactic displayed in one of the timelines to be navigated to the details for that tactic. The path displays the appropriate screen (campaign, event, event plan, or program) according to the tactic type.
The Programs timeline	Shows active, completed, and planned programs. To display the child campaigns and related events, double-click on the folder icon next to a program in the chart.
The Campaigns timeline	Shows active, completed, and planned campaigns.
Events timeline	Shows active, completed, and planned event plans and events.

To view timelines

- 1 Navigate to the Marketing Calendar screen.
- 2 In the Marketing Calendar link bar, click a timelines type.

The various timeline types and their corresponding color indicators are shown in the following table.

Timeline Type	Color Indicator
Active	Green
Canceled	Red
Completed	Blue

Timeline Type	Color Indicator
Planned	Yellow
Scheduled	Orange

Associating Documents with Programs and Campaigns

Most marketing teams generate documents such as proposals, white papers, press releases, and artwork used in advertising. These documents can be attached to programs and campaigns for future reference.

To attach documents to programs and campaigns

- 1 Navigate to the Campaigns or Programs screen.
- 2 In the Programs or Campaigns list, click a program or campaign.
- 3 In the Plan link bar, click Documents.
- 4 Click the Attachments view tab.
- 5 To add a URL, in the Attachments list, perform the following steps:
 - a Click New URL.
 - b In the URL field, enter the URL, and click Add.
- 6 To attach a file, in the Attachments list, perform the following steps:
 - a Click New File.
 - b In the Choose File dialog box, select the file, and click Open.
- 7 In the Comments field, add information that identifies the file's contents.
- 8 (Optional) If you want changes to the original file to be included in the attached file, select the Update File check box to set this preference.

To access the attached document

- In the Documents list, click the Attachment Name to view document details.

Process of Setting Up Campaigns

You use campaigns in Siebel Marketing and Siebel Campaigns. Prior to launching a campaign, you need to perform some or all of the following tasks:

- [Marketing Segments and Segment Trees on page 33.](#)
- [Chapter 6, "Creating and Using Offers."](#)
- [Creating Campaigns on page 119.](#)

- Campaign Elements That Can Be Associated with Campaigns on page 122.
- Associating Offers with Campaigns on page 123.
- Using SmartScripts with Campaigns on page 125.
- Process of Setting Up Teams and Groups on page 127.
- Using Assignment Manager with Campaign Contacts on page 134.
- Process of Setting Up Campaign Quotas on page 135.
- Process of Setting Up Campaign Assignment Skills on page 139.
- Associating Lists of Prospects or Contacts with Campaigns on page 154.
- Adding Contacts and Prospects to Campaigns Individually on page 156.
- Using Waves with Campaigns on page 159.
- About Previewing and Generating Lists on page 160.
- Determining Campaign Activities and Milestones. For more information, read the chapter about activities in *Applications Administration Guide*.
- Preparing Literature Items. For more information, read the chapter about literature in *Applications Administration Guide*.

Creating Campaigns

Use this procedure to create a campaign in the Campaigns screen.

To create a new campaign

- 1 Navigate to the Campaign Management screen.
- 2 In the Campaigns list, add a new record.
- 3 In the Campaigns form, complete the fields.

Some fields are described in [Table 32 on page 119](#). To display all fields in the Campaigns form, click the Show more button.

- 4 Complete the necessary fields for the campaign record, using [Table 32](#) as a guide.

Table 32. Frequently Used Fields for a Campaign Record

Field	Comments
Approval Status	If the value is Revised, the campaign is still being revised.
Assigned Budget	The amount of money approved to spend for the campaign.
Budget Request	If the campaign has been submitted as part of a Budget Request, the Budget Request ID appears.

Table 32. Frequently Used Fields for a Campaign Record

Field	Comments
Campaign Code	<p>Populated by Siebel Marketing. You can enter a source code for the campaign, or use the default record ID for the code.</p> <p>The source code for this campaign is available for use as part of the source code format for the program. The value must be unique.</p>
Division	The internal division responsible for the campaign.
DNIS	<p>The telephone number associated with the campaign. This number must be set up separately in Siebel CTI (Computer Telephony Integration). The DNIS field for a campaign is used in CTI to query for this campaign and drive a screen pop to this campaign. For more information, read <i>Siebel Communications Server Administration Guide</i>.</p> <p>Enter only numerals in this field. Do not use hyphens, spaces, parentheses, periods, or any characters other than numbers.</p>
Execution Period	The predefined time period during which the campaign is active.
Language	The language in which the call script and offer was created. If no language is specified, the selected SmartScript runs in the default language for the application. If the script does not have a translation for the language selected, you get an error when you try to run the script.
Lead Partner	<p>If a lead partner was assigned at the program level and the campaign associated with that program does not have a lead partner, the campaign inherits the lead partner from the program. The choice of Lead Partner is limited to the organizations associated with the campaign.</p> <p>You can change the value, selecting from any of the partners associated with a campaign or campaign. This lead partner is copied to any campaigns created from this campaign and to responses or opportunities that result from this campaign.</p>
Name	<p>The name of the campaign.</p> <p>You can have two campaigns with the same name but the campaign code for each campaign must be unique.</p>
Organization	<p>The predefined organization that is responsible for the campaign. You can choose more than one organization.</p> <p>You can also associate Partner Organizations with the campaign. Partner organizations are created and administered through Partner Administration. For more information, read <i>Siebel Partner Relationship Management Administration Guide</i>.</p>

Table 32. Frequently Used Fields for a Campaign Record

Field	Comments
Planned Start/ Planned End	<p>The planned start date defaults to the date you created the campaign. The planned end date defaults to 30 days later.</p> <p>These dates do not affect launching campaigns. A campaign launches even if the planned end date has passed.</p>
Priority	<p>The priority level for the campaign. This value can be used to refine contact frequency rules in segmentation criteria. For example, to exclude customers that have been targeted by a Priority 1 campaign in the last 30 days.</p>
Product Lines	<p>You can associate product lines to the campaign to help categorize the campaigns.</p>
Products	<p>You can associate products to the campaign to help categorize the campaigns.</p>
Program	<p>This field populates when the campaign is associated with a specific marketing program.</p>
Purpose	<p>In the Plan view tab. The purpose of a campaign, for example: "To cross sell products to existing customers."</p>
Region	<p>Choose from the list the region in which the campaign is active.</p>
SmartScript	<p>Select a call script, if needed, to guide the agent's interaction with the customer. To appear in the list, scripts must be set up in advance using Siebel SmartScript. For instructions, read <i>Siebel SmartScript Administration Guide</i>.</p> <p>The call script starts when an agent clicks the Script button in the Campaign Contacts or Prospects view.</p> <p>You can use the Call Guide as an alternative to a SmartScript call script.</p> <p>If more than one script is associated with a campaign, the script flagged as <i>primary</i> runs when the agent clicks the Script button.</p>
Stage	<p>This field is populated with stage information when the campaign is associated with a specific program's stage.</p>

Table 32. Frequently Used Fields for a Campaign Record

Field	Comments
Status	<p>By default, campaign status is Planned (start and end dates in the future). Status values may be changed at any time. During automatic program execution, the status changes to active when a campaign is loaded. At the conclusion of the program, the campaign's status changes to completed. If the program is executed manually, the status does not automatically change.</p> <p>To change the status, use the status drop-down list to choose Active (start date in the past and end date in future) or Completed (start and end date in the past).</p>
Type	Choose from the list the type of campaign you are creating. Options include Acquire, Retain, Win-Back, Cross-Sell, and Up-Sell.

Campaign Elements That Can Be Associated with Campaigns

Table 33 contains descriptions of many elements in the Campaign view tabs that can be associated with a campaign.

Table 33. Campaign Elements That Can Be Associated with a Campaign

Plan and Design Element	Location and Description
Activity List	On the Schedule link bar. Team members can create and assign activities related to the campaign.
Activity Plans	On the Plan link bar. Templates of activities can be associated with a campaign. For more information, read About Creating and Using Activity Plans on page 114 .
Documents	On the Plan link bar. Any team member can associate documents as attachments to the campaign.
Execution Options	On the Design link bar. The campaign execution options specify the default values for these settings each time the campaign is loaded.
Expenses	On the Plan link bar. Each campaign can have a forecast that predicts the financial performance of the plan. The actual results versus the forecast can be tracked for each campaign.
Lead Partner	Field in the Campaign Details form view. Anytime a Campaign Plan is loaded, the Lead Partner is added to the associated campaign. The lead partner must be one of the organizations associated with the campaign.

Table 33. Campaign Elements That Can Be Associated with a Campaign

Plan and Design Element	Location and Description
Offers	On the Design link bar. Each time the campaign is loaded or launched the associated offers is copied to the campaign. For more information, read Associating Offers with Campaigns on page 123 .
Organizations	Field in the Campaign Details form view. These are the organizations that have visibility to the campaign under All Campaigns. When the campaign is loaded, each organization is included on the associated campaign.
Related Events	On the Design link bar. After you launch a campaign that has an associated related event, campaign contacts are added to the campaign as invited attendees. For more information, read Associating Related Events with Campaigns on page 125 .
Team Members	Field in the Campaign Details form view. These are the employee positions that have visibility to the campaign under the My Campaigns option. When the campaign is loaded, each team member is included on the associated campaign.

Associating Offers with Campaigns

Before you implement a marketing program, you should associate one or more offers with the campaign, depending on your marketing strategy. The Offers list provides information about each offer, including the name and description, the offer type, and the source code assigned to this particular offer, and any associated product and price list.

When you load a campaign, Siebel Marketing creates a campaign record, and copies valid offers to the campaign. Any views showing the offers for each campaign have built-in visibility to prevent invalid offers from appearing to end users. A *valid offer* is as an offer with a current date that falls between its defined activation and expiration dates. If activation and expiration dates are not defined for the offer, the offer is valid by default. When you load and launch a campaign, Siebel Marketing copies the campaign offers to the wave history.

NOTE: If you plan to change offers during the campaign (after launching one or more waves), you should not disassociate the previous offer. Instead you should mark the previous offer as expired (using the expiration date), and associate the new active offer. This method continues to capture and report on responses from the previous version of the offer.

To associate offers with a campaign

- 1 Navigate to the Campaign Management screen.
- 2 In the Campaigns list, click the campaign name.
- 3 Click the Design view tab.
- 4 In the Offers list, create a new record.
- 5 In the Add Offer dialog box, select a predefined offer, and click OK.

To associate a segment with a campaign

- 1 In the Marketing Module, create a segment.
- 2 Navigate to the Campaigns screen > Campaign List view.
- 3 Click the campaign Name.
- 4 Click the Design tab.
- 5 In the Design link bar, click Segments/Lists.
- 6 Click Add Segment to associate the segment.

If the segment has never been used in a campaign previously, click Choose a new segment, and select the segment from the folder location where you saved it.

- 7 To associate more segments, repeat [Step 6](#).
- 8 After the desired segments are associated, click the menu on the upper campaign form, and choose Load Campaign to associate the members of the segment to the campaign.
- 9 Pick a time and date for the load request, and click OK.

[Table 34](#) describes how prospects and contacts can be used in segments associated with campaigns.

Table 34. Scenarios for Using Segments in Campaigns

Scenario	Data Source	Integration Object	Comments
Segment contains only contacts	Siebel OLAP or Siebel OLTP	Marketing Contact	Fully supported. Contacts exist in the Siebel transactional database, so data is inserted only into the S_CAMP_CON table.
Segment contains only contacts	Non-Siebel database	Marketing Contact	Fully supported. New contacts and accounts (if mapped) are created in the Siebel transactional database.
Segment contains only prospects	Siebel OLAP or Siebel OLTP	Marketing Person	Fully supported. Prospects exist in the Siebel transactional database, so data is inserted only into S_CAMP_CON.
Segment contains only prospects	Non-Siebel database	Marketing Prospect	Fully supported. New prospects are created in the Siebel transactional database. Make sure that the Campaign Load List Format for the segment is configured to load data into the Marketing Prospect integration object.

Table 34. Scenarios for Using Segments in Campaigns

Scenario	Data Source	Integration Object	Comments
Segment contains contacts and prospects	Siebel OLAP or Siebel OLTP	Marketing Person	Fully supported. Contacts and prospects exist in the Siebel transactional database, so data is inserted only into S_CAMP_CON and S_DD_USER_KEY tables.
Segment contains contacts and prospects	Non-Siebel database	N/A	Currently not supported.

Associating Related Events with Campaigns

Events can be associated with a campaign so that you can invite contacts and prospects to an event. For more information about related events, read [Using Siebel Marketing with Siebel Events Management on page 141](#).

To associate events with a campaign

- 1 Navigate to the Campaign Management screen.
- 2 In the Campaign list, click the campaign name.
- 3 Click the Design view tab.
- 4 In the Offers link bar, click Related Events.
- 5 Create a new record, and click the Name select button.
- 6 In the Pick Event dialog box, select a predefined event, and click OK.

Using SmartScripts with Campaigns

A *SmartScript* is a script that the salesperson or call center agent uses to interact with the customer. It can be associated with any campaign.

If a SmartScript is associated with a business component and is run for a campaign, then that business component's name must be the same as the value in the Enable Follow-up Actions field for the campaign. For example, if the Enable Follow-up Actions field is set to Create Responses, then the script's business component must be Response. If the Enable Follow-up Actions field is set to Create Opportunities, then the script's business component must be Opportunity.

A script based on the Opportunity business component can be run only when the value in Enable Follow-up Actions is either Create Opportunities or All. A script based on the Response business component can be run only when the value in Enable Follow-up Actions is either Create Responses or All.

To set up a SmartScript

- 1 Navigate to the Campaign Management screen.
- 2 Select a campaign.
- 3 In the SmartScript field, click the select button.
The Smart Scripts dialog box appears.
- 4 Select the script from the list of available scripts, and click Add.
NOTE: To add the remaining scripts used in this campaign, repeat Step 3 and Step 4.
- 5 In the SmartScript dialog box, select the check box of the primary script, and click OK.

Creating and Applying Campaign Templates

Using templates can save you time and effort. For example, many mailed campaigns use the same patterns of offers, such as an initial contact offer, a follow-up offer, and a thank-you or welcome offer. Email campaigns have a repeated patterns as well, starting with an initial offer, followed by confirmations for people opting in and opting out, followed by a welcome offer for new customers. By creating and using templates, you can save yourself time and effort and make your campaigns more consistent.

You can save any campaign as a reusable campaign template. The template retains many of the planning details from the campaign such as the goals, expenses, offers, documents, segments, lists, and activity plans. After you create a campaign template, you can reapply the template to any new campaigns. You can also share the template with other employees in your organization.

To save a campaign as a campaign template

- 1 Navigate to the Campaigns screen.
- 2 In the Campaigns list, select a campaign to use as a template.
- 3 In the Campaign form, click the menu button, and choose Save as Template.
This menu option is active only if your administrator has given you permission to use this action (using the Marketing access groups).
- 4 In the Save As Template dialog box, enter a name, and click OK.

To make changes to the new template

- 1 Navigate to the Marketing Templates screen > Campaign Templates view.
- 2 Query for the template you created in Step 4 of the previous procedure.
- 3 In the template list or form, make the necessary changes.

To apply a campaign template to a campaign

- 1 Navigate to the Campaigns screen.

- 2 In the Campaigns list, create a new campaign, or select a campaign to which to apply the template.
- 3 In the Campaign form, click the menu button, and choose Apply Template.
- 4 In the Apply Template dialog box, select a template to apply, and click OK.
- 5 When asked if you want to continue, click OK.
The Message dialog box, appears, confirming that the template was applied.
- 6 In the Message dialog box, click OK.

Process of Setting Up Teams and Groups

Many organizations assign groups of agents to particular campaigns based on skill or territory.

The most direct way to provide access to the campaign is by assigning positions to a team. However, if you have a large call center where agents are organized by predefined groups of agents, you can set up assignments once and then assign the group to each campaign. Setting up campaign groups lets you add the key positions to a campaign group, without having to remember individual employees.

Some call centers do not have predefined groups, or the groups change often. In this case you can assign positions directly to the campaign team. Every employee position in the team has access to the campaign. To work with campaign teams and groups, perform the following tasks:

- [Assigning Teams to Campaigns on page 127](#). (Used by Siebel Marketing and Siebel Campaigns)
- [Setting Up Campaign Groups on page 128](#). (Used by Siebel Campaigns)
- [Associating Groups with Campaigns on page 128](#). (Used by Siebel Campaigns)

Assigning Teams to Campaigns

Campaign teams are used by Siebel Marketing and Siebel Campaigns. Campaign teams are set up by assigning individual employees to a team that is associated with the campaign. Each employee position on the campaign team has access to the campaign in the Campaigns screen.

If you are working with partners in developing the campaign, you can also include a partner as a team member by adding that partner's position. The partner may then view the campaign in the Partner Portal, in the Campaign Management screen.

To assign a team to a campaign

- 1 Navigate to the Campaign Management screen.
- 2 In the Campaigns list, click the campaign name.

- 3 In the Team field, click the select button.

The creator of the campaign is assigned as the primary member of the Campaign Team. This position may be removed from the team only after you select a different member of the team to be the Primary.

- 4 In the Team Members dialog box, select employees from the Available list, and click Add.

To select multiple consecutive employees, hold down SHIFT as you select each name. To select multiple nonconsecutive employees, hold down CTRL as you select names.

- 5 Click the Primary field to select the primary team member, and click OK.

The default primary team member is the position that created the campaign.

Setting Up Campaign Groups

Campaign groups are positions within your company, not individual employees. After you add a group to a campaign, anyone occupying a position listed in the group has access to the campaign. Campaign groups are used by Siebel Campaigns and can be associated with a campaign in Siebel Marketing.

To create a campaign group and add group members

- 1 Navigate to the Campaign Management screen.
- 2 In the Campaigns link bar, click Campaigns Groups.
- 3 In the Campaign Groups list, add a new record.
- 4 Enter a name and description for the group.
- 5 In the Campaign Groups list, select the group.
- 6 In the Positions list, add a new record.
- 7 In the Add Positions dialog box, select the positions for the group, and click OK.

Associating Groups with Campaigns

After you have created the campaign group, you can associate the group with your campaign. Campaign groups are used by Siebel Campaigns.

To add a group to a campaign

- 1 Navigate to the Campaign Management screen.
- 2 In the Campaigns link bar, click Campaigns Groups.
- 3 In the Groups list, create a new record.
- 4 Enter a name and description for the group.

- 5 In the Campaigns link bar, click Campaigns List.
- 6 Select the campaign.
- 7 In the Group field, click the select view button.
- 8 In the Add Groups dialog box, select the group from the available list, and click Add.
- 9 Click OK.

Process of Setting Up Campaign Execution Options

Campaign execution options are available in Siebel Marketing and Siebel Campaigns. Use the campaign execution options to specify campaign contact ownership and control the user's ability to edit campaign contacts and prospects. You specify the ownership type and complete the default owners (organization and position). In addition, you can apply assignment rule groups (optional) that perform owner assignment.

Campaign contact ownership is a feature to control team members visibility into the campaign contacts. Team members accessing the Campaign Contacts view can display only those campaign contacts and prospects that they own.

You create these assignment rules in the Assignment Rules view in the Assignment Administration screen. For more information, read *Siebel Assignment Manager Administration Guide*. You select a rule group for a campaign in the Campaigns screen.

To establish execution options and apply Assignment Manager rules to campaign contacts, perform the following tasks:

- [Setting Up Execution Options for Campaigns on page 129](#)
- [Using Assignment Manager with Campaign Contacts on page 134.](#)

Setting Up Execution Options for Campaigns

You can select the default execution options for each campaign when you set up the campaign. After the campaign is loaded, you can modify the execution options for the associated campaign at any time.

To assign contact ownership, make sure that you select the appropriate Campaign Contact Ownership value, your default owners, the Contact editing flags, and an Assignment Manager rule group.

To set execution options for the campaign

- 1 Navigate to the Campaigns screen.
- 2 In the Campaigns list, click a campaign name.
- 3 Click the Design view tab.

- 4 In the Design link bar, click Execution Options or Execution Options - Advanced and complete the fields.

NOTE: Some fields exist only in the Execution Options - Advanced link.

Execution options fields are described in the following tables:

- Assignment options (Table 35 on page 130)
- Collaboration options (Table 36 on page 131)
- Delivery options (Table 37 on page 132)
- Load Options (Table 38 on page 133)

Table 35 describes the actions executed by each Execution option field.

Table 35. Execution Options - Assignment Option Fields

Field	Action
Assignment Rule Group	Required if you select Yes - Assignment Manager in the Campaign Member Ownership field. Use if you want Assignment Manager to assign the organization owner and position owner to contacts and prospects in the campaign. Select a rule group to apply to contacts in the campaign.
Campaign Member Ownership	Controls assignment of position owner and organization owner during the load process. Values are: <ul style="list-style-type: none"> ■ No. You do not want to assign ownership. When you select this option, the Organization Owner and Position Owner fields are left empty on the campaign contacts and prospect records. ■ Yes - Manually. When you select this option, the load process populates the Default Position Owner and Default Organization Owner to the Campaign History table (S_CAMP_CON) for the contacts and prospects in the load. After the load process, you can manually assign organization and position owners on the campaign contacts and prospect records. ■ Yes - Assignment Manager. You want Assignment Manager to assign ownership based on Assignment Manager rule groups. The load process invokes the Assignment Manager engine at the end of the process to assign the campaign members based on the rules in the selected Assignment Rule Group.
Default Organization Owner	(Optional) Default value that is populated into the Default Organization Owner field during the load process when assignment is enabled (Yes - Assignment Manager or Yes - Manually). The list of organizations is restricted to the organizations associated with the campaign. After the value is populated, it may be updated if the assignment engine reassigns names. For more information, read <i>Siebel Assignment Manager Administration Guide</i> .

Table 35. Execution Options - Assignment Option Fields

Field	Action
Default Position Owner	<p>(Optional) Default value that is populated into the Default Position Owner fields during the load process when assignment is enabled (Yes - Assignment Manager or Yes - Manually).</p> <p>The list of positions is restricted to the Default Organization Owner organizations associated with the campaign. After the value is populated, it may be updated if the assignment engine reassigns names. For more information, read <i>Siebel Assignment Manager Administration Guide</i>.</p>
Lock Campaign Team Assignment	Campaign managers sometimes create assignment rules that assign additional positions to the campaign team. This lock flag excludes this campaign from the rules, so that new team members would not be assigned.

Table 36 describes the collaboration options for each Execution option field.

Table 36. Execution Options - Collaboration Options

Field	Action
Enable Contact Editing	Default is on (True). When this option is checked, users on the campaign team or group have the ability to add and delete contacts from the campaign list.
Enable Contact Editing	<p>Default is on (True). Clear the check box to prevent anyone from changing the owner fields and adding and deleting contacts. This flag controls the ability to edit the following fields on the campaign contact or prospect record:</p> <ul style="list-style-type: none"> ■ Contact Last Name ■ Done Flag ■ Organization Owner ■ Prospect Last Name ■ Position Owner <p>In addition, when this value is True, the New and Delete buttons are available.</p>
Enable Partner Editing of Contacts	Default is on (True). Clear the check box to prevent partners from editing the fields and using the buttons controlled by the Enable Contact Editing check box.
Enable Partner Editing of Contacts	When this option is checked, partners associated to the campaign (as organizations) have the ability to add and delete contacts from the campaign list.

Table 36. Execution Options - Collaboration Options

Field	Action
Enable Followup Actions	<p>This value controls which buttons (Create Oppty, Create Order, Create Response, Script) are active in the Campaign agent views (Campaign Members). The following list describes the values:</p> <ul style="list-style-type: none"> ■ Create Opportunities. The Create Response and Create Oppty buttons are active. ■ Create Orders. The Create Response and Create Order buttons are active. ■ Create Responses. The Create Responses button is active. ■ All. All buttons are active.
Enforce Approvals	<p>When this option is active, the campaign cannot be launched unless the Approval Status for the campaign and its associated offers is Approved. You receive an error if you try to launch a campaign and the conditions are not met.</p>
Control Campaign	<p>This flag denotes that this campaign is meant to be used as a control group for a test and control program. Control campaigns are hidden from the outbound call center agent views (Campaign Members - Outbound), because control groups should not receive offer messages. Control Campaigns do appear in the Inbound version the Campaign Members view, because you want to be able to capture unsolicited responses.</p>
Enable Contact Editing	<p>When this option is checked, users on the campaign team or group are able to add an delete contacts from the campaign list.</p>

Table 37 describes the delivery options for each Execution option field.

Table 37. Execution Options - Delivery Options

Field	Action
Route Contacts	<p>This flag controls whether campaign contacts should be routed to mobile clients. By default all routing rules for campaign contacts are disabled.</p>
Use Pregenerated Files	<p>When this option is checked, the launch option uses the most recent list export file for the wave being launched.</p> <p>To generate an email list file or a list export file for other channels, use the Campaign > Export > List Distribution view</p>
Route Prospects	<p>This flag controls whether campaign prospects should be routed to mobile clients. By default all routing rules for campaign prospects are disabled.</p>

Table 38 describes the load options for each Execution option field.

Table 38. Execution Options - Load Options

Field	Action
Load Behavior	<p>Controls what happens to the previous wave or load when the user opts to load the campaign again. The following is a list of choices:</p> <ul style="list-style-type: none"> ■ Overwrite Campaign History. Purges entire existing campaign history and creates a new load. ■ Create New Wave. Creates an additional load or wave for the latest load. ■ Add to Existing Wave. Finds the most recent good wave (not purged or suspended) and adds the campaign load members to the existing wave.
Allow Repeated Contacts with Load	<p>Controls whether a specific contact or prospect ID can appear more than once in the same load in the campaign.</p> <p>The unique index in S_CAMP_CON (campaign members or contacts table) is based on Campaign ID, Load Number, Contact/Prospect ID, and Token Number. By default the application always populates a value of 1 in the column, so that uniqueness is driven by the contact and campaign. However, if you turn off this option, the token number becomes a running number so there is no uniqueness enforced at the table level. This scenario is typical in certain industries such as Life Sciences where there is a many-to-many relationship between contacts and accounts. For example, in the pharmaceutical industry, doctors are affiliated with multiple hospitals and the pharmaceutical companies send offers to all of their active addresses in the same campaign.</p>
Source Code Format	<p>The source code format to be used to generate source codes for the campaign. If the format is associated to the program level too, the value should be carried over when a campaign is created on the program flow.</p>
Generate Source Codes during Load	<p>Generates source codes for waves that have not been launched at the completion of the campaign load. If the option is disabled, you need to manually generate the source codes using the Generate Source Codes menu option in the campaign screen.</p>
Capacity Limit per Load	<p>If this value is set to a value greater than 0 (zero), the campaign load stops inserting campaign members as soon as the capacity is reached. For example, you could limit the campaign size to no more than 1000 people per load.</p>
Max Errors	<p>This setting controls when the campaign load (EAI) process should abort. The load process tabulates the number of rejected records that were not inserted due to errors (bad data and so on). After the Max Errors value is passed, the campaign load process aborts. When this value is 0 (zero), all inserts and updates for the batch are backed out.</p>

Using Assignment Manager with Campaign Contacts

After setting execution options, you can load and launch the campaign. If you chose to automatically assign an owner and associate an assignment rule group with the campaign, Assignment Manager runs against the contacts in S_CAMP_CON at the end of the campaign loading process.

Before launching a campaign, you can add or delete campaign contacts and prospects or change the organization and position owners associated with a contact or prospect.

When this editing process is complete, you can run assignment manager against the campaign contacts and prospects to make sure ownership and visibility are correct.

To run Assignment Manager

- 1 Click the Run Assignment Manager button in the Execution Options view tab.
- 2 Select a campaign.

Assignment Manager runs using the campaign history table (S_CAMP_CON) for that campaign's contacts and prospects. For example, partners or employees may add new contacts to the campaign during the review process. Because these new leads may not have the correct owner, you can rerun Assignment Manager to assign these new records.

NOTE: You cannot run Assignment Manager until the campaign has successfully loaded.

To automatically assign owners to campaign contacts

- 1 Navigate to the Campaigns screen.
- 2 Click the campaign name.
- 3 Click the Design view tab.
- 4 In the Design link bar, click Execution Options.
- 5 Verify that the values in the following fields are correct:
 - Default Organization Owner
 - Default Position Owner
 - Assignment Rule Group

- 6 Load and Launch the campaign.

When the Campaign is loaded, Assignment Manager assigns owners to the campaign contacts.

- 7 To run Assignment Manager again, click the Run Assignment Manager button and select a campaign to load and launch.
- 8 Click Run Assignment Manager.

The Run Assignment Manager button is only available if you choose Yes - Assignment Manager in the Campaign Contact Ownership field.

- 9 In the Pick Campaign dialog box, select a campaign, and click OK.

Process of Setting Up Campaign Quotas

Quotas are used by Siebel Marketing and Siebel Campaigns and may be set up for a campaign as an incentive for agents to meet target goals. A *quota* is a goal, such as a monetary goal for generating a certain amount of revenue for a campaign, or it may be a nonmonetary goal such as making a certain number of calls within a time period.

To develop a quota plan with measurable objectives and rewards for success, use the following process and the quota view tabs to define details. For more information, read *Siebel Incentive Compensation Administration Guide*. To set up campaign quotas, perform the following tasks:

- 1 [Creating Campaign Quota Plans on page 135](#)
- 2 [Defining Quotas for the Plan on page 136](#)
- 3 [Assigning Awards to the Campaign Quota Objective on page 137](#)
- 4 [Assigning Campaign Quota Plan Participants on page 138](#)

Creating Campaign Quota Plans

Use the following procedure to set up quota plan for your campaign. Then, using the procedures that follow, define the details of the quota plan.

To create a quota plan

- 1 Navigate to the Campaign Management screen.
- 2 Click the campaign name.
- 3 Click the Design view tab.
- 4 In the Design link bar, click Quotas.
- 5 In the Quotas list, create a new record.
- 6 Complete the fields for the quota plan.

Some fields are described in [Table 39](#).

Table 39. Quota Plan Fields

Field	Comment
Active Flag	Set to True when you create the quota.
Description	Description of the quota plan.
End	Populated when the Period field is completed.
Internal Division Name	The name of the internal division associated with this quota.
Period	(Required) The time period for which the quota is active.

Table 39. Quota Plan Fields

Field	Comment
Plan Name	(Required) Enter a relevant name for the Quota Plan.
Start	Populated when the Period field is completed.

Defining Quotas for the Plan

After you define the quota plan, add quota objectives that participants must meet to receive incentives. Prior to adding new quotas, add the appropriate Quotas, Awards, and Plan Participants.

To add quota objectives to the quota plan

- 1 Navigate to the Campaign Management screen.
- 2 Click the campaign name.
- 3 Click the Design tab.
- 4 In the Design link bar, click Quotas.
- 5 In the Quotas list, click the plan name.

The quota plan details appear in the Plan form, and quota objectives appear in the Quotas list.

- 6 In the Quotas list, create a new record.
- 7 In the Add Quota Objectives dialog box, select an objective, and click OK.

Repeat [Step 6](#) and [Step 7](#) to add additional quota objectives to the quota plan.

To edit quota objective values

- 1 Navigate to the Campaign Management screen.
- 2 In the Campaign list, click the campaign name.
- 3 Click the Design tab.
- 4 In the Design link bar, click Quotas.
- 5 In the Quotas list, click the plan name.

The quota plan details appear in the form, and quota objectives appear in the Quotas list.

- 6 Select the quota objective record and change values in the appropriate fields.

Information about some fields in the quota objective record is described in the following table.

Field	Comment
Description	Contains a detailed summary of the quota objective. You can edit this field.
Measure	(Read only) Values are Revenue and Units. You typically add a Target Amount quota for a revenue measure and a Target Quantity quota for a units measure.
Quota Type	(Read only) Values are Amount and Quantity.

The next time you select the quota record, your modifications appear.

Assigning Awards to the Campaign Quota Objective

Quota plan participants may receive awards for meeting campaign objective goals. A number of awards for different performance achievements may be set up using the Awards view tab list. These awards can then be assigned to quota objectives.

To assign predefined awards to a quota objective

- 1 Navigate to the Campaign Management screen.
- 2 In the Campaigns list, select the campaign.
- 3 Click the campaign name.
- 4 Click the Design tab.
- 5 In the Design link bar, click Quotas.
- 6 In the Quotas list, click the plan name.

The quota plan details are displayed in the form, and quota objectives appear in the Quotas list.

- 7 Click the Award select button and, in the Pick Quota Incentive dialog box, select the award for meeting the quota.

After you click OK, the selection appears in the Award field.

- 8 In the Target Quantity field, click the calculator button, and use the calculator to enter the number of units that represents the quota target.

To create new awards

- 1 Navigate to the Campaign Management screen.
- 2 Click the campaign name.
- 3 Click the Design tab.

4 In the Design link bar, click Quotas.

5 In the Quotas list, click the plan name.

The quota plan details are displayed in the form, and quota objectives appear in the Quotas list.

6 In the Administration - Sales Quota link bar, click Awards.

7 In the Awards list, create a new record.

8 Complete the necessary fields for the award.

Some fields are described in the following table.

Field	Comment
Amount	In the field, click the arrow, and use the calculator controls to enter the dollar amount for the award. If the type is cash, then this value is the amount of cash given with the award.
Award Date	In the field, click the arrow, and use the calendar controls to specify the date the reward is given.
Description	Enter a description of the award.
Name	Enter a reference name for the award.
Type	Select the award type from the drop-down list. Options are Dinner, Cash, Trip, and Other. Your administrator may change these values to reflect your company's requirements.

Assigning Campaign Quota Plan Participants

Assign eligible participants to your quota plan using the Participants view tab.

To add participants to the campaign quota plan

1 Navigate to the Campaign Management screen.

2 Click the campaign name.

3 Click the Design tab.

4 In the Design link bar, click Quotas.

5 In the Quotas list, click the plan name.

Quota objectives appear in the Quotas list.

6 Click the Quota Plan Participants view tab.

7 In the Participants list, create a new record.

- 8 In the Participants list, create a new record, and complete the fields.

This field updates if you change the participant's start or end date. You can also edit the Prorate field directly. For each plan participant, quotas are calculated by multiplying the prorate by the target amount or quantity.

For example:

$$\text{Prorate} = ((\text{Participant's End Date} - \text{Participant's Start Date}) + 1) / ((\text{Period End Date} - \text{Period Start Date}) + 1)$$

Repeat this procedure to add other participants.

Process of Setting Up Campaign Assignment Skills

Campaign assignment skills are set up only in Siebel Campaigns. Setting up campaign assignment skills is a way to identify which employees have certain skills and define the attributes of each skill.

Assignment Manager uses assignment skill rules to assign telesales agents to a campaign. Assignment skills are categories, such as Product or Language. Campaign Skill Items are subsets of campaign skills. For example, a skill item for the product campaign skill may be 486 Laptop or Pentium Desktop. A skill item for the language campaign skill may be French or English.

When associating skills with a campaign, first define the assignment skill, and then assign properties to the skill using the Campaign Skill Item list. Fields in the Campaign Skill Item list vary according to the skill. Repeat these procedures to add as many skills as needed to the campaign.

To set up assignment skills for a campaign, perform the following tasks:

- 1 [Associating Assignment Skills with Campaigns on page 139](#)
- 2 (Optional) [Defining Campaign Skill Items on page 140](#)
- 3 (Optional) [Deleting Assignment Skills and Campaign Skill Items on page 140](#)

Associating Assignment Skills with Campaigns

Use the following procedure to define and associate assignment skills required for your campaign.

To associate multiple assignment skills with a campaign

- 1 Navigate to the Campaign Management screen.
- 2 In the Campaigns list, click the campaign name.
- 3 Click the Design tab.
- 4 In the Design link bar, click Assignment Skills.
- 5 In the Assignment Skills list, create a new record.
- 6 Complete the fields, typing comments that describe the skill and how it is used in the campaign.

Defining Campaign Skill Items

Use the following procedure to define items for each campaign skill associated with your campaign.

To associate skill items with a skill

- 1 Navigate to the Campaign Management screen.
- 2 In the Campaigns list, click the campaign name.
- 3 Click the Design tab.
- 4 In the Design link bar, click Assignment Skills.
- 5 In the Assignment Skills list, select a skill.
- 6 Scroll down to the Campaign Skill Item list, and create a new record.
- 7 In the Campaign Skill Item list, complete the fields defining the properties for each skill item.

Deleting Assignment Skills and Campaign Skill Items

You can delete assignment skills and campaign skill items. When you delete an assignment skill, its campaign skill items are deleted.

To delete an assignment skill and its campaign skill items

- 1 Navigate to the Campaign Management screen.
- 2 Click the campaign name.
- 3 Click the Design tab.
- 4 In the Design link bar, click Assignment Skills.
- 5 In the Assignment Skills list, select the skill, and delete the record.

You have deleted the assignment skill and the campaign skill items that were associated with it.

To delete a campaign skill item

- 1 Navigate to the Campaign Management screen.
- 2 Click the campaign name.
- 3 Click the Design tab.
- 4 In the Design link bar, click Assignment Skills.
- 5 In the Assignment Skills list, select the skill.
- 6 Scroll down to the Campaign Skill Item list, and select an item to delete from the assignment skill.
- 7 Delete the skill record.

Using Siebel Marketing with Siebel Events Management

Sales and marketing professionals can use the Siebel Events Management module to create, coordinate, and manage events across the enterprise, resulting in improved client interaction and expansion of the marketing message.

Siebel Events Manager is integrated with Siebel Marketing, so you can create complex, multistage event marketing programs. Marketing administrators can use the Program Flow view to associate events with marketing campaigns. Upon execution of the campaign, attendees are invited to the event and populated in the event attendee list. Siebel Marketing tracks responses when the attendees decide to accept the invitation and begin the registration process. As a result, event managers can track each attendee through the life of the event, from invitation, to confirmation, and to attendance.

Customers who have purchased the required license options for both Siebel Marketing and Siebel Events Management, can invite contacts or prospects to an event through an email marketing campaign. Sending this kind of invitation involves creating a target segment or list of invites, associating a related event to a campaign and email offer, and launching the campaign to send out email invitations with an embedded Event Web site URL. During execution, campaigns that have a related event automatically add the campaign contacts or prospects to the event as attendees, with a Registration Status of Invited.

Unlike contacts, prospects are not required to log in to the events Web site to register for an event. Therefore, this method for inviting prospects may be particularly useful in the case where third-party prospect lists are imported and not promoted to contacts. Invited prospects appear in the Events screen, Attendees subview.

Promoting an Event Using a Campaign

This task assumes that you have already created an Event and Offer. In most cases, you would invite contacts or prospects using an Email Offer. Siebel Marketing also supports other types of offers, such as Direct Mail, Fax, or SMS. However, the automatic embedding of the Siebel Events Web site URL only works with an Email Offer.

To promote an event using a campaign

- 1 Creating a campaign and adding a Related Event.

For more information, read [Creating Campaigns on page 119](#) and [Associating Related Events with Campaigns on page 125](#).

- 2 Launch the campaign.

For more information, read [Launching Programs and Campaigns on page 163](#).

- 3 To display the invited contacts or prospects after the campaign launch, navigate to the Event screen > Attendees view.

Promoting an Event Using a Program

This task assumes that you have already created the events, campaigns and offers and that these entities are associated (such as associating an offer to a campaign and an event to a campaign). In most cases, users invite contacts or prospects using an Email Offer. Siebel Marketing also supports other types of offers, such as Direct Mail, Fax, or SMS. However, the automatic embedding of the Siebel Events Web site URL only works with an Email Offer.

To promote an event using a program

- 1 Create a program.
For more information, read [Creating Programs on page 59](#).
- 2 Navigate to the Programs screen, and click the program name.
- 3 In the Program Flow workspace, select the campaign used to promote the event.
- 4 In the Objects palette, click and drag the event icon onto the program flow workspace.
- 5 Select the event from the Pick Event dialog box.
- 6 Launch or schedule the program as you normally would.
For more information, read [Executing Programs on page 69](#).
- 7 After each campaign launch, display the invited contacts/prospects by navigating to the Event screen > Attendees view.

Testing Campaigns

You can test outbound email, wireless, and fax campaigns in Siebel Marketing and Siebel Campaigns before actually sending them to target recipients. You can preview the offer delivery distribution and then launch the email campaign using the Send functionality.

When you use the test offer feature, a sample of the offer is sent to a designated team member, based on his or her position. Because the test functionality references a position rather than a person, if the individual holding the position changes, the test offer is sent to the person actually holding the position.

To test campaigns and offers, read the following topics:

- [Scenario for Testing Campaigns on page 142](#)
- [Testing Campaigns That Have Email, Fax, and Wireless Offers on page 143](#)

Scenario for Testing Campaigns

The marketing manager of a telecommunications company plans to roll out a campaign that targets mobile communications customers whose service agreements expire in the next quarter. The campaign features an email containing information on the latest wireless communications offers. The business goal is to retain the accounts of those customers by offering incentives for signing a new service agreement.

The marketing manager uses Test Offer to view the content and format of the email before it is sent to targeted customers.

Testing Campaigns That Have Email, Fax, and Wireless Offers

Test Offer sends samples of email, fax, or wireless offers associated with a particular campaign to designated team members, based on positions. Before testing email offers, make sure you complete the following tasks:

- **Make sure the offer is active.** The date in the Activation Date field for the email offer must have arrived, and the date in the Expiration Date field must be current or in the future for the Test Offer command to be enabled.
- **Associate the offer with a campaign.** Associate the offer with an active campaign. For more information, read [Associating Offers with Campaigns on page 123](#).

To test email, fax, and wireless campaign offers

- 1 Navigate to the Campaign Management screen.
- 2 In the Campaigns list, click the campaign name.
- 3 In the Campaign form, perform the following steps:
 - a Click the Team select button.
 - b In the Team Members dialog box, select an employee from the Available list, click Add, and then click OK.
- 4 Click the Design view tab.
- 5 In the Design link bar, click Offers.
- 6 In the Offers list, select an email offer.
- 7 Click the menu button, and choose Test Offer.
- 8 For email offers, choose a merge field from the Available Merge Fields list.
- 9 For fax and wireless offers, choose from the list of available team members in the Campaign Team dialog box.
- 10 Verify the email offer has been sent to the specified email address.

About Using Response Management

Siebel Marketing and Siebel Campaigns use Response Management. Whenever prospects or contacts respond to an offer through any channel (by inbound email, the Web, a call center, or sales representative), their responses may be captured in detail using the Responses screen. Using Response views, you can determine which contacts to pursue as opportunities.

Campaign media can be different from response media. Recipients of an Internet campaign can respond through a call center, and recipients of a direct mail offer may respond by going to a Web offer URL. A Web site can capture response details, while phone calls or direct mail responses must be recorded manually.

NOTE: In Siebel Marketing, inbound emails are not automatically captured as responses. You must configure your email response product to support inbound email processing. For Siebel Email Response set-up instructions, read *Siebel Email Response Administration Guide*.

There are several response types and each response type has several parameters that store details about a given response. You can modify an automatically captured response if you have permission. Responses are tracked for an offer and for a campaign.

To use Response Management, you may perform some or all the following optional tasks:

- [Adding Response Information to Prospect or Contact Records on page 144](#)
- [Using Automatic Source Code and Offer Code Lookups on page 145](#)
- [Adding Products to Responses on page 146](#)
- [Adding Orders to Responses on page 146](#)
- [Adding Opportunities to Responses on page 147](#)
- [Adding Attachments to Responses on page 147](#)
- [Response Type Definitions on page 148](#)
- [Promoting Responses to Opportunities on page 152](#)
- [Creating Automatic Responses from Opportunities and Orders on page 152](#)

Adding Response Information to Prospect or Contact Records

The All Responses list displays responses to selected campaigns and offers. Use this view to add response information to existing prospect or contact records, to promote a contact to an opportunity, to specify the response type and channel, and to score the response. Use an optional Details form to enter more information about the response.

To add response information to prospect or contact records

- 1 Navigate to the Responses screen.
- 2 In the Responses list, create a new record.

- 3 In the Responses list or form, complete the fields, using the following table as a guide.

Fields	Comment
Last Name	Select the Last Name for a prospect or contact. Some fields are populated based on this selection. These include: <ul style="list-style-type: none"> ■ The first name of the respondent. ■ The account associated with the respondent. If no account is associated, use the Account select button to choose one. ■ The account address (city, state, country, telephone number, and so on), that are associated with the respondent are automatically filled in the form.
Lead Partner	Choose a partner organization to associate with the response. If a lead partner was assigned at the program level or campaign level, that partner appears in this field. If you do choose to change the Lead Partner value, the drop-down list shows only those partners associated with the campaign source.
Response Method	(Optional) The method used to capture the response.
Offer Name	(Required) Only offers associated with the selected campaign appear in the list.
Score	Enter a numeric value that represents a score for the response.
Source Code	In Siebel Marketing and Siebel Campaigns, source codes are assigned to each campaign contact according to the source code format associated with the program stage. If the source code is included in offer materials, then it can be accessed by the recipients in their responses.
Offer Code	Each offer has a unique offer code. If the offer code is included in the offer materials, then it can be accessed by the recipients in their responses.

Using Automatic Source Code and Offer Code Lookups

Behind each Responses view is an automatic business service that looks up and decodes information based on any source codes or offer codes added in a response.

Source Code Lookups

To perform a source code lookup, enter the campaign contact’s source code into the Source Code field on the response form and leave the field. You do not have to save the record to perform the lookup. As soon as you click or step off the field, the lookup service determines whether the campaign is recognized and whether the contact name can be uniquely determined. If the source code is recognized, the correct campaign name is defaulted. If the contact name can be uniquely determined within a campaign, the contact name is also defaulted. The source code value is stored in the campaign history table (S_CAMP_CON) for each contact record.

Offer Code Lookups

To perform an offer code lookup, enter the offer code in the response form. When you save the record, if the lookup service recognizes the offer code, it defaults the correct offer name.

NOTE: If the source code or the offer code is not recognized by the application or if the two codes conflict, neither values is saved and the response record is not committed to the database.

If your deployment does not require source code lookups, you can disable the Response Lookup business service in Siebel Tools.

Adding Products to Responses

This view tab displays a list of products associated with the response, for example, products for which a respondent requested information using a product link in an email or Web offer.

To add products to a response

- 1 Navigate to the Responses screen > Responses view.
- 2 In the Responses list, click the description.
- 3 Click the Products view tab.
- 4 In the Products list, create a new record.
- 5 In the Add Products dialog box, select the product from the list, and click Add.

The list contains products that have been associated with the offer.

Adding Orders to Responses

This view tab displays a list of the respondent's product orders. An order record contains information on the order status, the order number, type, account associated with the order, the date, priority, and description of the order.

To add orders to a response

- 1 Navigate to the Responses screen > Responses view.
- 2 In the Responses list, click the description.
- 3 Click the Orders view tab.
- 4 In the Orders list, create a new record.
- 5 In the Add Orders dialog box, select the order from the list, and click Add.

Adding Opportunities to Responses

This view tab displays a list of opportunities associated with the response.

To add opportunities to a response

- 1 Navigate to the Responses screen > Responses view.
- 2 In the Responses list, click the description.
- 3 Click the Opportunities view tab.
- 4 In the Opportunities list, create a new record.
- 5 In the Add Opportunities dialog box, select the opportunity from the list, and click Add.

Adding Attachments to Responses

This view tab displays a list of documents and other items that are associated with the response record.

To add attachments to a response

- 1 Navigate to the Responses screen.
- 2 In the Responses list, click the description.
- 3 Click the Attachments view tab.
- 4 To add a URL, in the Attachments list, perform the following steps:
 - a Click New URL.
 - b In the URL field, enter the URL, and click Add.
- 5 To attach a file, in the Attachments list, perform the following steps:
 - a Click New File.
 - b In the Choose File dialog box, select the file, and click Open.

Response Type Definitions

The information captured and stored in the Response Details view depends on the response type that you select in the Response Type field of the response record. For each response type value, [Table 40](#) identifies some of the field names in which information is captured and describes the captured information.

NOTE: A Response is not automatically created when you click a Related Events link in an email or Web offer. Siebel Marketing and Siebel Campaigns do not provide responses for Clicked on Related Event.

Table 40. Response Type Field Values in the Response Details Form

Response Type	Field Name	Captured Information and Description
Accepted Invitation	Summary	Indicates user accepted invitation.
Attended	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect attended the event.
Cancelled	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect canceled.
Clicked on event URL	Description	Contains Event Name. Indicated that the contact or prospect clicked on the URL in the invitation email.
Clicked on Product URL	Summary	Name of the product. The list of product URLs the respondent clicked appears in the Responses screen, Products view.
Clicked on Web Offer	Summary	Name of the Web offer that the offer recipient clicked.
Completed Web Survey	Summary	Name of the Web survey that the offer recipient clicked.
Confirm Subscribe to List	Summary	Indicates that the user's request to subscribe has been processed. An email is sent to confirm this status.
Confirm Unsubscribe to List	Summary	Indicates that the user's request to unsubscribe has been processed. An email is sent to confirm this status.
Confirmed	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect confirmed his or her attendance.
Declined Engagement	Description	Indicates that the user declined participation in the topic.
Declined Invitation	Summary	Indicates that the user declined the invitation.

Table 40. Response Type Field Values in the Response Details Form

Response Type	Field Name	Captured Information and Description
Downloaded Info/ File(s)	Downloaded File	Name of the downloaded file.
	Subject	Subject of the file.
	Summary	Optional comment.
Email Bounceback	Subject	Subject of the file
	Summary	Optional comment
Email Reply	Subject	Subject of the file.
	Summary	Optional comment.
Forward to a Friend	Comment	Allows user to include personal note to friend who is receiving the forwarded message.
	Email Address	Input area for Email address of friend who is receiving the message.
	First Name	Input area for First Name of the friend who is receiving the message
	Last Name	Input area for Last Name of the friend who is receiving the message.
Gave Referral	Summary	Indicates user provided a referral.
Invited	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect was invited.
No Interest	Summary	Indicates the user was not interested in topic.
No-Show	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect did not arrive at the event.
One Click Unsub	Summary	Indicates that the user's request to unsubscribe has been processed.
Pending	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect is currently in the process of registering.
Read Receipt	Not applicable	An optional response type that requires additional configuration to support automatic creation. Marketers can embed an HTML tag in HTML emails that Siebel Marketing can use to count each time the email is opened (read). The read receipt tag contains an image request. When that image is requested it is interpreted as an opened email.
Rejected		

Table 40. Response Type Field Values in the Response Details Form

Response Type	Field Name	Captured Information and Description
Requested Unsubscribe Response	Subject	Can store the subject line of an inbound email or be edited manually.
	Summary	Contents of the email. Applies only to campaign responses.
	Time of Day (Subscribe by phone)	Indicates the respondent's preference for a time if the respondent wishes to subscribe by telephone. Choices are Morning, Afternoon, and Evening.
Requested call back	Phone #	Respondent's phone number.
	Priority	Priority level of the callback request. Choices are Urgent, High, Medium, and Low.
	Summary	Stores the comments for a Web-generated response or can be edited manually.
	Time of day	Indicates the respondent's preference for the time of callback. Choices are Morning, Afternoon, and Evening.
	Topic	Can store the subject line of an inbound email or be edited manually. The list of products for which the respondent requested a callback appears in the Responses screen, Products list.
Requested Further Engagement	Description	Indicates that the user has requested further discussion
Requested more info	Comments	Stores the comments for a Web-generated response. Other comments may be entered manually.
Requested more info	Email	Email address, if the delivery method is email.
Requested more info	Fax	Fax number, if the delivery method is fax.
Requested more info	Phone	Phone number, if the delivery method is phone.
Requested more info	Ship Method	The preferred method of delivery—direct mail, email, fax, or phone—that the customer has specified be used for delivery of information.
Requested more info	Street Address, City, State, ZIP, Country	The address to which the information is mailed if the preferred delivery method is direct mail.
		The list of products for which the respondent requested information appears in the Responses screen, Products list.

Table 40. Response Type Field Values in the Response Details Form

Response Type	Field Name	Captured Information and Description
Requested more info	Topic	Can store the subject line of an inbound email or be edited manually.
Requested Unsubscribe	Email, Fax, Phone, Direct Mail	The choices are subscribe and unsubscribe.
Respondent Interested	Description	Indicates that the responder has shown interest in topic.
Respondent Purchased	Not applicable	This response is not created automatically. You must use Siebel Business Process Designer to capture responses of this type. The orders for this purchase are displayed in the Responses screen's Orders view.
Respondent unreachable	Summary	Optional comment.
Response created opportunity	Summary	The list of opportunities can be accessed by selecting the Responses Opportunities view.
Submitted Source Code		
Subscribe to List	Summary	Indicates that the user's request to subscribe has been processed.
Unclassified Response	Not applicable	The response does not fall into one of the main response type categories or is a campaign response that requires manual processing.
	Subject	Subject of the email. Applies only to campaign responses.
	Summary	Contents of the email. Applies only to campaign responses.
Unsubscribe to List	Summary	Indicates that the user's request to unsubscribe has been processed.
Waitlisted	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect has been waitlisted due to exceeded capacity.
Walk-in	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect arrived at the event without registration.

Promoting Responses to Opportunities

If the customer is interested in the product offered by the campaign, you can promote the response to an opportunity. If the customer is an existing contact, the account is associated with the opportunity. If the customer is a prospect, the customer is promoted to a contact, and then associated with an account.

To promote a response to an opportunity

- 1 Navigate to the Responses screen.
- 2 In the Responses list, click the Description name.
- 3 In the Response form, click Create Opportunity button.

The Opportunity form appears, with the response information in the form, and the contact information in the Campaign Leads Contacts list.

Creating Automatic Responses from Opportunities and Orders

When you create an opportunity in the All Contacts/Prospects view using the Create Opty button, Siebel Marketing and Siebel Campaigns create a response record using the Create Auto Response business service.

For opportunities, the response is created for each contact added to an opportunity after a campaign is associated as an opportunity source. To create the response, associate a campaign with the opportunity using the Source field MVG (multivalued group) and then add a contact to the opportunity. All responses default to a type of Created Opportunity.

For orders, the response is created whenever a campaign is associated with a sales order. To create the response, you associate a campaign with the Sales Order using the Campaign field. All responses default to a Type of Respondent Purchased.

Associating an Opportunity with a Campaign

To associate an opportunity to a campaign, you use the Source field on the Opportunity form to select the campaign name. Each opportunity can be associated with multiple sources, if appropriate, but only one can be designated as the primary source.

When this association is made, the opportunity appears under the Campaign Track Results tab in the Opportunities view with the Sourced from Marketing flag checked.

Associating an Order with a Campaign

To associate an order with a campaign, you use the Campaign field on the order form to select the campaign name.

Reviewing and Adding Campaign Elements in Campaign Explorer

You can use the Campaign Explorer view in Siebel Marketing and Siebel Campaigns to review subcampaigns, contacts, activities, and offers for each campaign. The left pane of this view contains an explorer, and the right pane shows the details of the selected campaign.

You can use the detail list to add folder items. For example, to add an activity, you select the Activity folder in the left pane, and the Activities list appears on the right. Then, from the list, you add a new activity record.

To review campaign elements

- 1 Navigate to the Campaign Management screen > Explorer view.
- 2 In the Campaign Explorer, expand the folders for each campaign to display subfolders of campaign elements.
- 3 Click a folder to display detail of the subcampaign, contacts, activities, and offers in the list on the right.

To add items to folders

- 1 Navigate to the Campaign Management screen > Explorer view.
- 2 In the Campaign Explorer, expand the campaign item to show its folders.
- 3 Click the folder.
- 4 In the details list, add a new record and complete the fields.

Process of Loading Customers in Campaigns

When you load a campaign, the campaign members are added to the campaign history by loading segments and lists (as well as any names added manually using the user interface). For more information about segments, read [Marketing Segments and Segment Trees on page 33](#).

The following types of lists are used by Siebel Marketing and Siebel Campaigns:

- **External lists.** You can import purchased or rented lists into your application using List Management. When you use List Management with Siebel Data Quality you can scrub lists for duplicates during the import process. For more information, read [Process of Importing and Managing External Lists on page 180](#).
- **Internal lists.** You can also use List Management to maintain lists created from records that already exist in your contacts or prospects databases. For more information, read [Process of Creating and Managing Internal Lists and Subscription Lists on page 193](#).

- **D&B lists.** D&B lists are generated from D&B libraries of companies based on criteria you define. The D&B module provides a library of incorporated businesses that you can market to. Using the D&B screen you can create a list of D&B contacts to use in your campaign. For more information, read the chapter about D&B in *Applications Administration Guide*. Reviewing and Adding Campaign Elements in Campaign Explorer. For more information on integrating List Management with D&B, read [Integrating List Management with D&B on page 205](#).

NOTE: When a campaign has both segments and lists, the segments load before the lists.

To load customers in a campaign, you perform the following tasks:

- 1 [Associating Lists of Prospects or Contacts with Campaigns on page 154](#)
- 2 [Adding Contacts and Prospects to Campaigns Individually on page 156](#)
- 3 [Viewing Campaign Contacts and Prospects on page 157](#)
- 4 [Loading Campaigns on page 157](#)

Associating Lists of Prospects or Contacts with Campaigns

This topic discusses associating an imported (or purchased) list and an internal list of prospects or contacts with a campaign.

When you associate a purchased list with a campaign, you import the list, and then associate the list with a campaign. Prospects are only visible in the Campaign Contacts list if you successfully import the purchased list before associating it with a campaign. If contacts or prospects are added to a list after you associate that list with a campaign, you need to suspend the wave that did not include the new customers and load the campaign again.

CAUTION: If you associate an empty list (a list prepared for import but not yet imported) with a campaign and then import the list, the prospects are not associated with the campaign and are not visible in the Campaign Prospects list.

After you associate a list with a campaign, the Contact/Prospect List does not immediately display data. You must load the campaign before the members are added to the campaign history. The list is populated after the Marketing Campaign Load workflow process runs, and you may need to refresh the browser view to display the newly associated names. For more information, read *Siebel Marketing Installation and Administration Guide*.

Use the following procedure to associate available imported or internal lists of contacts and prospects with your campaigns. Before you associate a list with a campaign, make sure that the Siebel Server, the Object Manager component, and Workflow Process Manager component are running.

NOTE: You can only associate *active* campaign lists with a campaign.

To associate a list of prospects or contacts with a campaign

- 1 Navigate to the Campaign Management screen.
- 2 In the Campaign list, click the campaign name.

- 3 Select the Design view tab.
- 4 In the Design link bar, click Segments\Lists.
- 5 Click the Add List button.
- 6 In the Add Lists dialog box, select a list, and click OK.

NOTE: When you associate a campaign list with a campaign, contacts in that list are associated with the campaign. If you change the campaign list to be inactive or if you delete it, the contacts still appear in the Contacts/Prospects list for that campaign.

Troubleshooting the Contact/Prospect List

The Contact/Prospect list may not show contacts or prospects that have been recently associated with the list. To resolve the problem, look for it in [Table 41](#).

Table 41. Contact/Prospect List Troubleshooting

Symptom	Diagnostic Steps and Cause	Solution
The newly associated contacts or prospects do not appear in the Contact/Prospect List	Marketing Campaign load is not yet complete or the browser display has not yet been refreshed.	Wait for the Marketing Campaign Load workflow process to complete and then refresh the browser.

Table 41. Contact/Prospect List Troubleshooting

Symptom	Diagnostic Steps and Cause	Solution
After waiting for the Marketing Campaign Load workflow process to complete and after refreshing the browser, the newly associated prospects or contacts do not appear in the Contact/Prospect List	None of the campaign waves have been launched.	Launch one or more waves, or launch the campaign.
	None of the customers in the campaign meet the search specification for the view.	Modify the search specification. Consider the following possibilities: <ul style="list-style-type: none"> ■ Campaigns that are Launched or Completed ■ Campaign Wave that is launched ■ The campaign contact record that is assigned to the position of the user ■ The campaign contact records that is not Marked for Deletion ■ Control Campaign flag = N ■ Contact and Prospect Do Not Call Flag = N
	The campaign contacts and prospects have been assigned to a different organization and/or position.	In the Campaign Management > Design > Execution Options view, check the values for Campaign Member Ownership, Default Organization Owner, and Default Position Owner.

Adding Contacts and Prospects to Campaigns Individually

In addition to loading a campaign from segments, lists, or both, you can add individual contacts and prospects to a campaign. The ability to add or delete contacts and prospects can be controlled in the Execution Options view by using two flags (Enable Contact Editing and Enable Partner Editing of Contacts). If these flags are checked, the New and Delete buttons are available. The buttons are available in Siebel Campaigns in the Campaign Administration views, but not the other Campaign views. For more information, read [Process of Setting Up Campaign Execution Options on page 129](#).

After you add a list of contacts and prospects to a campaign and then load the campaign, these contacts and prospects appear in the All Contacts/Prospects view and in the All Contacts/Prospects across Organizations view.

You can also add contacts and prospects one at a time. For more information, read [Chapter 9, "List Management."](#)

To add a contact or prospect to a campaign

- 1 Navigate to the Campaign Management screen.

- 2 In the Campaigns list, click the campaign name.
- 3 Click the Execute view tab.
- 4 In the Execute link bar, click All Contacts/Prospects.

The list of available contacts or prospects appears, with information on the selected contact or prospect record displayed in the Contact or Prospect Details form.

- 5 To add a contact, click Pick Contacts.
- 6 To add a prospect, click Pick Prospects
- 7 In the Pick dialog box, perform one of the following actions:
 - a Select one or more existing records, and click OK.
 - b Click New to create a new contact or prospect, then enter the information, and click OK.
- 8 In the Contacts and Prospects Detail form, complete the fields.

Viewing Campaign Contacts and Prospects

If you have access to the campaign, you can view the assigned contacts and prospects using one of the following procedures.

To view marketing contacts and prospects

- 1 Navigate to the Campaigns screen > Campaigns List view.
- 2 In the Campaigns list, click the campaign name.
- 3 In the Execute link bar, click All Contacts/Prospects.

The Contacts/Prospects list appears, showing only the assigned contacts and prospects for that campaign.

Loading Campaigns

After you associate your lists, segments, and segment tree cells with your campaign, you can load the campaign. Campaigns can be loaded from the Campaign form in any of the Campaign Management views or from the Campaigns list.

To load a campaign from the Campaigns screen

- 1 Navigate to the Campaigns screen.
- 2 From the Campaigns list, click the campaign name.
- 3 In the Campaign or Campaign Details form, click the menu button, and choose Load Campaign.

NOTE: The Load Campaign option is active only if your administrator has given you this privilege using the Marketing access groups.

- 4 In the Load Campaign dialog box, assign the date and time for the load to start, and then click OK.
- 5 Click the Execute view tab to review the load status.
- 6 In the Execute link bar, perform the following steps:
 - a To display the history of each wave that has been loaded, click Execution Status.
 - b To display details of the load process, click System Tasks.
- 7 Click Refresh to update the load status.

About Reviewing Contacts and Prospects in Active Campaigns

Sales people and contact center employees can use the Campaign Members dashboard to review the contacts and prospects in active campaigns. The Campaign Member views display a queue of active campaign contacts/prospects and a campaign summary, contact and prospect summary.

Campaign Members screen displays the active campaign members according to several levels of visibility. [Table 42](#) shows the levels of visibility available.

Table 42. Levels of Visibility in the Campaign Members Screen

Level of Visibility	Description
My Campaign Members	Displays campaign contacts/prospects that are specifically assigned to the employee's position.
All Campaign Members - Outbound	Displays campaign contacts/prospects in active, launched campaign waves and the campaign members that are assigned to the employee's organization. This view does not display any members of control campaigns.
All Campaign Members - Inbound	Displays campaign contacts/prospects in active, launched campaign waves and the campaign members that are assigned to the employee's organization. This view includes members of control campaigns.

The Campaign agent views only display campaign members (contacts and prospects) that are in active campaigns and for which campaign waves have been launched to the contact center. Any waves that have not been launched by a member of the campaign team or administrator do not appear.

Using Waves with Campaigns

When you create a campaign, a default wave record is also created. The default record allocates 100% of the contacts in wave A. If the campaign is part of a marketing program, you set up the waves in the Programs screen. For more information, read [Setting Up Waves for Campaign Loads on page 65](#).

For stand-alone campaigns, you create waves in the Campaign screen. The delay between waves can be defined as hours or days.

To set up multiple waves for a stand-alone campaign

- 1 Navigate to the Campaigns screen.
- 2 Click a campaign.
- 3 Click the Design view tab.
- 4 In the link bar, click Wave Settings.
- 5 Add new wave records, using [Table 43](#) as a guide, and save the wave record.

Table 43. Fields in the Campaign Waves Form

Field	Comment
Wave Code	Enter a wave code, up to 10 characters. You cannot save the record without a wave code. The wave code appears as part of the source code for the campaign member if you set up the source code format to include it. The wave code for the default wave is A.
Description	Describe the characteristics of the wave.
Lag	The default is 0. Enter the amount of time the wave is delayed after loading a campaign. The maximum lag for the waves cannot be greater than number of days between the start date and end date of the campaign. The wave is launched when the server processes the Launch Campaign request. This server process can be scheduled or can be manually started using the right-click menu in the Program Flow workspace.
Lag Unit	Choose either Hours or Days.
%	The default percentage is 100 for a single wave. If you are planning multiple waves, first reduce the percentage number in the first wave and enter the percentage of contacts that are included in the second wave. The total percent values cannot exceed 100%.

About Previewing and Generating Lists

You can create output lists of contacts for export to a fulfillment partner or another application. Direct mail vendors often require specific formatting of campaign lists. When a campaign is ready for launching, the target list may be exported according to a flexible list format and distributed using FTP or email. You can define, manage, and preview the list format without the intervention of an administrator. Default formats can be assigned for each vendor.

You can preview a sample of the list to determine if the output file layout is what you want and then generate the actual distribution list that is sent to vendors.

After a list has been generated, the records in it do not change even when the contacts and prospects who meet the segmentation criteria change. If you modify the members of the campaign, you should regenerate the list files using the latest data.

Lists can be generated manually using the List Distribution view in the Campaign screen or scheduled as part of a scheduled launch of a program stage or stand-alone campaign.

Previewing Lists

Prior to launching a campaign, you should check that the list generation works properly. To do this, preview the list and inspect how the list data appears in the fields. The preview uses the first 500 rows of contact data, and these 500 contacts may or may not be in your final generated lists. They are used only to model how the list format looks with actual data.

To generate this preview file, your Export List Format should be built so that it exports data from same data source where the campaign load data is also extracted. Typically, this is the Siebel Data Warehouse or another data mart or data warehouse where the segment members are extracted during campaign load.

To generate a preview list

- 1 Verify that an export list format exists and meets the requirements stated in this section.
 - 2 Navigate to the Campaigns screen, and in the Campaign list, click the campaign name.
 - 3 Click the Execute view tab, and in the Execute link bar, click List Distribution.
 - 4 Select either List Export or Email Personalization as the type of list format.
 - 5 If you selected Email Personalization, select an Email offer in the Offer field.
 - 6 If you select List Export, then create a new record in the Vendor list.
 - a Using the Vendor select button, select a vendor.
 - b Using the Export List Format select button, select one or more export list formats. Be sure to select an appropriate list format type for the type of channel (direct mail, email, and so on).
- NOTE:** Select the list format that you created in Step 1 from the folders.
- 7 Click Generate Output Lists to generate the preview file.
 - 8 In the dialog box, select one or more waves, and then click OK.

- a Give the server a few minutes to process the job, and then click the Refresh button in the Generated Lists applet.
- b (Optional) To monitor the job, click System Tasks in the Execute link bar.

When the file is created, it appears in the Generated Lists list. If the list format has splits set up in the formatting, multiple files appear in the list. Refer the Content Description column to view details about the file contents. Drill on the list name to open it, or save it to your computer.

Manually Generating Campaign Lists

The following procedure explains how to manually generate a list for a campaign.

To generate a list for a campaign

- 1 Navigate to the Campaigns screen, and in the Campaign list, click the campaign name.
- 2 Click the Execute view tab, and in the Execute link bar, click List Distribution.
- 3 Click New to create a new list distribution entry.
- 4 Select a vendor.

If the vendor has a default list format, that format name appears in the Export List Format field.

- 5 Click the Export List Format select button.
- 6 In the Pick Export List Format dialog box, select your list format from the folders.
- 7 Click Generate Output Lists to generate the file.
- 8 Give the server a few seconds or minutes to process, and then click the Refresh button in the Generated Lists applet.

If desired, use the System Tasks view under Execute tab to monitor the job.

When the file is created, it appears in the Generated Lists list. If the list format has splits set up in the formatting, multiple files appear in the list. Refer the Content Description column to view details about the file contents. You can click the list name to open it, or save it to your computer.

8

Launching Programs and Campaigns

You can create output lists of contacts for export to a fulfillment partner or another application. Direct mail vendors often require specific formatting of campaign lists. When a campaign is ready for launching, the target list may be exported according to a flexible list format and distributed using FTP or email. You can define, manage, and preview the list format without the intervention of an administrator.

This chapter contains the following sections:

- [About Launching Programs and Campaigns on page 163](#)
- [Process of Launching Campaigns on page 164](#)
- [Process of Using the Schedule Calendar View on page 167](#)
- [Displaying Campaign Charts in Siebel Campaigns on page 170](#)
- [Process of Displaying Response Charts in Siebel Campaigns on page 175](#)

About Launching Programs and Campaigns

When you launch a campaign, the Server Request Broker starts the Marketing Campaign Launch workflow process. This process sends contact list files to specified vendors, most commonly using FTP (file transfer protocol), and email offers are sent to targeted recipients.

You can launch a marketing program in the following ways:

- **Launch a campaign manually.** You can launch a campaign using the campaign form menu in any of the campaign views or by right-clicking on the campaign object in the program flow. For more information about manual execution, read [Launching Campaigns Manually on page 164](#).
- **Launch a program stage automatically.** You can schedule a stage of a program to launch automatically (including all the campaigns in the stage) from the Program screen. In the Schedule view tab, click the Calendar link. For more information about automatic execution, read [Process of Using the Schedule Calendar View on page 167](#).
- **Launch a campaign automatically.** You can schedule a campaign to launch automatically from the Campaign screen. In the Schedule view tab, click the Calendar link. For more information read, [Process of Using the Schedule Calendar View on page 167](#).

You launch email campaigns through the Siebel Email Marketing Server. Export list files, wireless offers, and faxes are distributed through the Siebel Communication Server. Make sure that your Email Marketing Server and Communication Server are online so that the launch completes successfully.

When you launch a campaign, you must know which campaign wave or waves you want to launch, especially if your campaign is a recurring campaign. In most cases, the wave you want is the most recent wave. However, when you launch the campaign, make sure that you select the correct wave from the Launch Waves dialog box.

NOTE: On the Marketing Server component, a parameter called Wave Batch Size determines the number of subwaves created. Each subwave creates a new request or thread to the email sending daemon.

For email campaigns, the Email marketing server can process parallel tasks for improved scalability. To enable the generation of email files for each thread, be sure to split the Email Server list format correctly.

Process of Launching Campaigns

You may choose to manually launch one or more waves of a campaign. You can launch a campaign using the applet menu on the campaign form in any of the campaign views or by right-clicking on the campaign in the program flow.

To launch a campaign, perform the following tasks:

- [Launching Campaigns Manually on page 164](#)
- [Launching Email and Fax Campaigns on page 165](#)
- [Checking Campaign Launch Status on page 166](#)
- [Suspending and Relaunching Email Campaigns on page 166](#)

Launching Campaigns Manually

Before launching a campaign manually, make sure you have performed the following tasks:

- Add a position to the marketing Administrators Access Group. The position of the person who launches the campaign must be a member of the Marketing Administrators access group. If the position is not part of this access group, the launch buttons are unavailable. For instructions, read *Siebel Marketing Installation and Administration Guide*.

NOTE: This requirement also applies to a partner using the Siebel Partner Portal.

- In the Campaign List Distribution view, set up vendors and export list formats.
- Load any segments, segment tree cells, and lists that you plan to use into the campaign history.
- If you plan to send offers that use a distribution profile, test the campaign to make sure that the profile is set up correctly and that offer is sent with expected results. For more information on testing campaigns, read [Testing Campaigns on page 142](#).

You may choose to manually launch one or more waves of a campaign. You can launch a campaign using the applet menu on the campaign form in any of the campaign views or by right-clicking on the campaign in the program flow.

After performing tasks in [Launching Campaigns Manually on page 164](#) you are ready to launch the campaign. Launching a campaign calls the Marketing Campaign Launch workflow process. After launching a campaign, you can check the results by looking at history records for programs, stages, and campaigns.

To manually launch campaigns

- 1 Navigate to the Campaigns screen, and in the Campaigns list, click the campaign name.
- 2 From the campaign form menu, choose Launch Campaign.

The Launch Campaign Dialog Box contains the valid waves that are available for launching. Waves with a status of Loading, Load Failed, Scheduled, Launched, Purged, or Purge Failed do not appear.

- 3 In the Launch Campaign dialog box, select one or more waves to launch, and click OK.

Launching Email and Fax Campaigns

If you have tested your email or fax campaign, and the results are satisfactory, you are ready to send the email offers to campaign recipients.

To send email and fax offers

- 1 Navigate to the Campaign Management screen.
- 2 In the Campaigns list, select the campaign.
- 3 Click the campaign name.
- 4 Click the Design view tab.
- 5 In the Campaigns form, click the menu button, and choose Launch Campaign.
- 6 In the Launch Waves dialog box, select a wave to launch, and click OK.

Understanding the Marketing Campaign Launch Workflow Process

When you launch a campaign, the Marketing Campaign Launch workflow process initiates. For more information about workflow processes, read *Siebel Business Process Designer Administration Guide*.

Siebel Marketing sends the exported list file to each vendor in the List Distribution list of the Waves view, using distribution adapters and profile information. For example:

- **Email.** Siebel Marketing emails the exported list file to the vendor's primary contact.
- **FTP.** Each vendor has a profile specifying the host name, user name, and password. Siebel Marketing sends the exported list file using File Transfer Protocol to the vendor's FTP server.

For each wave, the server receives a request to send each valid offer in the campaign on the day the program is executed, adding to that date any lag days defined in the wave. Only those contacts or prospects assigned to a particular wave receive the offer.

Checking Campaign Launch Status

After you launch a campaign you can check its status and determine if it was successfully launched or if it failed.

To monitor campaign launch status

- 1 Navigate to the Campaigns screen, and in the Campaigns list, click the campaign name that you launched.
- 2 Click the Execute view tab.
- 3 In the Execute view link bar, click System Task.
- 4 In the System Tasks list, search for the Campaign Launch and Wave Launch jobs.
Use the Wave # field to find the wave that you launched.
- 5 In the System Tasks list, click Refresh to update the values in the record.
The Status field has three indicator boxes as shown in the following table.

Position	Color	Meaning
1	Red	An error occurred. The error message appears in the System Tasks and Task Log lists.
2	Yellow	Pending. The launch has not yet completed.
3	Green	The launch completed successfully with no errors.

- 6 To display the Task Log list, scroll down.

NOTE: If you cannot view color indicators, refer to *Siebel Business Applications Accessibility Guide* for assistance.

If campaign launch fails, you can display an error log using the Administration - Server Management screen's Tasks view.

Suspending and Relaunching Email Campaigns

A wave of a campaign can be suspended and relaunched in the event of an error or need to roll back a wave. For example, if email offers are not delivered because of a setup problem in the Email Marketing Server, you can relaunch the wave to resend the offers. Also, if you launch a wave into the call center, you can recall the wave so that it no longer appears to sales agents until the wave is relaunched.

To suspend a campaign wave

- 1 Navigate to the Campaigns screen.
 - 2 In the Campaigns list, click a campaign name.
 - 3 Click the Execute view tab.
 - 4 In the Execute link bar, click Execution Status.
 - 5 Locate the Wave with a Launched or Launch Failed status.
Use the Wave # field to confirm that you are displaying the correct wave.
 - 6 To suspend the wave, select the wave record and click Suspend Wave.
 - 7 After the wave is suspended, Suspended appears in the Status field.
- Make the necessary corrections, and then relaunch the campaign wave.

To relaunch a suspended campaign wave

- 1 Navigate to the Campaigns screen.
- 2 In the Campaigns list, select a campaign to relaunch.
- 3 Click the Execute view tab.
- 4 In the Execute link bar, click Execution Status.
- 5 Locate a wave to relaunch.
Use the Wave # field to confirm that you are displaying the correct wave.
- 6 In the Wave list, select the wave record, and click Launch Wave.
Launching a suspended wave resends any email offers, wireless offers, and vendor list files. It also causes the campaign members in the wave to reappear in the call center.

To identify and resend failed emails

- 1 Navigate to Administration-Communications > Outbound Request Overview.
- 2 Using the Description and Request # fields, locate your email campaign.
- 3 If the Status does not indicate successful completion, check the Status Message field to determine the cause.
- 4 After you have resolved the cause, resend the failed emails by clicking Submit.

Process of Using the Schedule Calendar View

When you complete a program design using Program Flow, you can schedule a stage of the program for execution using the Schedule calendar view.

To use the schedule calendar view, perform the following tasks:

- [Scheduling a Stage Execution on page 168](#)
- [Scheduling the Execution of Campaigns on page 169](#)
- [Understanding the Marketing Campaign Launch Workflow Process on page 165.](#)

Schedule Calendar View

When you complete a program design using Program Flow, you can schedule a stage of the program for execution using the Schedule calendar view. During automatic program execution, the Campaign Load and Marketing Campaign Launch workflow processes run for each campaign in the stage. If the stage is recurring, when the run of the stage is completed, it reschedules itself for the next run. For more information about workflow processes, read *Siebel Business Process Designer Administration Guide*.

The Schedule view displays the details of the selected program in the Program form at the top and a calendar at the bottom.

Scheduling a Stage Execution

Use the following procedure to schedule stages of a program for automatic execution.

To schedule the execution of a stage

- 1 Navigate to the Programs screen.
- 2 In the Programs list, click the program name.
- 3 Click the Schedule view tab.
- 4 In the Calendar view, click the calendar icon for the date that the program starts.
- 5 In the activity form, complete the fields using [Table 44 on page 168](#) as a guide.
- 6 Select the Active Flag so that the scheduling takes effect.

If you select the active flag, the stage executes as soon as the activity time arrives. If you do not select the active flag, no execution occurs.

- 7 Click Save This One when you are ready to save the schedule.

The stage name and launch time appear in the Schedule calendar. The calendar also reflects any recurrence of the stage.

Table 44. Activity Fields for a Stage Execution

Field	Comment
Comment	Enter more information about the program schedule, if desired.
Description	This field displays the previously added program description. Enter more information if desired.

Table 44. Activity Fields for a Stage Execution

Field	Comment
Frequency	If the program is repeating, choose the repeat cycle from the list. Options are Daily, Weekly, Monthly, Quarterly, and Yearly.
Planned Completion	The default value in this field is the program's end date. Click the calendar select button, use the calendar controls to set the date and time.
Planned Start	The default value in this field is the program start date. Click the calendar select button, and use calendar controls to set the start date and time for program execution.
Stage	(Required) You must select the stage of the program that should execute.
Type	(Required) The Type field displays Stage Execution as the default. If Stage Execution does not appear in the field, select it from the list.
Until	If the stage repeats over time and you want to delete every repeating instance, choose Delete All.

To edit the schedule

- 1 Navigate to the Programs screen.
- 2 In the Programs list, click the program name.
- 3 Click the Schedule view tab.
- 4 In the Schedule's calendar, click the program name.
Make sure the Active Flag is still checked so that execution occurs.
- 5 In the Schedule form, make changes, and click Save This One.

To delete a schedule

- 1 Navigate to the Programs screen.
- 2 In the Programs list, click the Schedule view tab.
- 3 In the Schedule's calendar, click the program name to open the Schedule form.
- 4 Click the menu button, and choose Delete This One.
If the stage repeats over time, you are asked if you want to delete a single instance or every repeating instance.

Scheduling the Execution of Campaigns

Campaigns can be created and set up to execute according to a schedule.

CAUTION: Do not perform this procedure if you already plan to schedule the parent stage for the same campaign. Doing so causes the campaign to be launched twice.

To schedule the execution of a campaign

- 1 Navigate to the Campaigns screen, and in the Campaign list, click the campaign name.
- 2 Select the Schedule view tab.
- 3 In the Schedule calendar, click the calendar icon in the day that the campaign starts.
- 4 In the activity form, in the Activity Type field, select Campaign Load and complete the remaining fields using [Table 44 on page 168](#) as a guide.

NOTE: Be sure to check the Active Flag for the scheduling to take effect. If the active flag is set, the campaign load launches as soon as the activity time arrives. If the active flag is not set, no execution occurs.

- 5 Click Save This One when you are ready to save the schedule.

The campaign name and load time appear in the Schedule calendar. The calendar also reflects any recurrence of the activity.

- 6 Click New to create another activity.

- 7 In the activity form, in the Activity Type field, select Campaign Launch, and complete the remaining fields using [Table 44 on page 168](#) as a guide.

Make sure to set the start time of the campaign launch activity so that the preceding campaign load activity completes before the corresponding campaign launch begins.

- 8 Verify that the Active Flag is set so that the scheduling takes effect.

- 9 Click Save This One when you are ready to save the schedule.

The campaign name and launch time appear in the Schedule calendar. The calendar also reflects any recurrence of the activity.

Displaying Campaign Charts in Siebel Campaigns

Only Siebel Campaigns uses Campaign charts, and you use these charts to review performance and graphically display results in a chart for areas such as incentive compensation, completed calls, lead quality by campaign, and so on. When you display a chart, the saved query in the upper-right corner filters the information shown in the chart.

To display charts in Siebel Campaigns, perform any of the following tasks:

- [Displaying Campaign Achievement Charts on page 171](#)
- [Displaying Call Status Analysis Charts on page 171](#)
- [Displaying Call Status Analysis by Employee Charts on page 172](#)
- [Displaying Lead Quality Analysis by Campaign Charts or Response Charts on page 172](#)
- [Displaying Opportunity Revenue Analyses on page 173](#)
- [Displaying Order Revenue Analysis Charts on page 174](#)
- [Displaying Campaign Trend Analyses on page 174](#)

Displaying Campaign Achievement Charts

The Campaign Achievement chart displays the results of the Sales Quota Plan set up for each campaign. The chart represents the percentage achievement of quota for each campaign and applies Incentive Compensation functionality to campaigns.

To prepare for generating the Campaign Achievement charts.

- 1 Create a quota plan, and associate quota plan objectives and participants with the plan.

Quotas are discussed in [Creating Campaign Quota Plans on page 135](#). For more information, read *Siebel Incentive Compensation Administration Guide*.

- 2 Enter achievement values by performing these tasks:

- a Navigate to the Sales Quotas screen.
- b In the Quota Achievement list, select the quota plan.
- c Enter the amount you achieved compared to quota numbers.

You can add Achievements manually or by using a workflow process that completes achievements based on actions in Siebel Call Center.

You can display the Campaign Achievement Chart from the Achievement Analysis view of the Sales Quota screen or the Charts view of the Campaigns screen.

To display Campaign Achievements in Siebel Campaigns

- 1 Navigate to the Campaigns screen.
- 2 In the Campaigns link bar, select Charts.
- 3 In the drop-down list, select Campaign Achievements.
- 4 In the Objects Against Achievement list, select the plan name.
- 5 In the By drop-down list, select Campaign Name or Objective Name.
- 6 Select the chart type from the third drop-down list.
- 7 Click Go to display the chart.

Displaying Call Status Analysis Charts

The Call Status Analysis chart displays the number of calls that have been completed compared to the number of calls that have not been completed for each campaign. This chart can be used by a call center manager to determine which campaigns are lagging and where to shift resources.

To update the Call Status field

- 1 Assign any contacts and prospects you are contacting to the campaign.

For more information, read [Adding Contacts and Prospects to Campaigns Individually on page 156](#).

- 2 After each contact or prospect is called, update the status in the Call Status field in the Contacts or Prospects list or form.

The chart is based on information from this field. A Call Completed flag indicates that the call is completed and the number of contacts and prospects targeted by the campaign.

Displaying Call Status Analysis by Employee Charts

The Call Status Analysis by Employee chart displays completed and uncompleted calls by a specified employee for each campaign. The values for this chart may be derived from lists of contacts and prospects assigned to the position and the Calls Completed field for the contact or prospect record in the Contacts or Prospects view.

A campaign list can be associated with a position. When such association occurs, the position becomes the owner of the Campaign Contacts or Campaign Prospects. If the OwnerID is assigned, then only the employees of that position can display the Campaign Contacts or Prospects for a particular campaign. If the list is not assigned, then the OwnerID is NULL and any employee assigned to the Campaign Team or Campaign Group can display the Contacts or Prospects view.

To prepare for generating the Call Status Analysis by Employee chart

- 1 If the employee position is evaluated based on lists of contacts and prospects, assign the lists to the position in the Campaign Lists view.

The position becomes the owner of the list's contacts and prospects.

When you associate a list with a campaign, if the Position field is not empty, then the OwnerID or each contact or prospect in that list is associated with that position.

Most companies do not assign the contacts or prospects to a position, so the OwnerID is NULL. In such cases, the chart shows only one employee: Unknown.

- 2 Update call status in the Campaign Contacts view.

The chart draws its values on which contacts have been called based on the Done flag in the Call Status field. Make sure this field reflects the current status of the call.

Displaying Lead Quality Analysis by Campaign Charts or Response Charts

The Lead Quality Analysis by Campaign chart displays the opportunities that have been created for the campaign when the Response Type is set to Opportunity. Using this chart, you can display opportunities by number of opportunities, by total opportunity revenue, or by average opportunity broken out by lead quality.

To prepare for generating the Lead Quality Analysis by Campaign chart

- 1** In the Campaigns list, click the campaign name, click the Responses view tab, and verify that the Response Type field is set to Opportunity.
- 2** In the Opportunities screen, for each opportunity created for a campaign, make sure values are entered in the Lead Quality, Revenue, and Source fields.

You can use the My Opportunities or All Opportunities views to display the opportunities you need to check.

The Lead Quality by Response chart displays the opportunities that have been created for a campaign when the campaign's Response Type is set to Response. The chart displays opportunities by number of opportunities, by total opportunity revenue, or by average opportunity broken out by lead quality.

To prepare for generating the Lead Quality by Response chart

- 1** In the Campaigns list, make sure the Response Type is set to Opportunity.
The Response Type field is in the Response's view tab, after drilling down on the campaign name.
- 2** In the Opportunities screen, make sure that the Revenue, Lead Quality, and Source fields are completed for each opportunity.

Displaying Opportunity Revenue Analyses

You can display opportunity revenue analyses on two charts:

- Opportunity Revenue Analysis Chart
- Opportunity Revenue Analysis by Employee Chart

Opportunity Revenue Analysis Chart

The Opportunity Revenue Analysis chart displays the campaign's Number of Opportunities and the Expected Revenue for those Opportunities. The left axis is Opportunity Revenue and the bar chart corresponds to Revenue. The right axis is the Number of Opportunities and the line chart corresponds to Revenue.

When using the chart, Opportunity Revenue Analysis by Campaign, only campaigns set to response type Response are used to create the chart.

This chart displays the relationship between the amount of revenue and the number of opportunities for campaigns. For example, a campaign administrator may use the chart to identify campaigns that are generating a high volume of opportunities but have a low potential for revenue and campaigns which generate a smaller number of opportunities but have a higher potential revenue per opportunity.

Before generating the chart, navigate to the Opportunities screen and make sure that the Revenue field contains a value for each opportunity associated with the campaign.

Displaying Opportunity Revenue Analysis by Employee Charts

The Opportunity Revenue Analysis by Employee chart shows the number of Opportunities and the potential revenue for opportunities for each employee. This chart displays information in the same way as the Opportunity Revenue Analysis chart, but it targets employees in the analysis.

To prepare for generating the Opportunity Revenue Analysis by Employee chart

- 1 Navigate to the Opportunities screen.
- 2 Select an opportunity associated with the campaign.
- 3 Make sure that the Revenue contains a value.
- 4 In the Sales Team field, enter the User ID of the agent generating the opportunity.

Displaying Order Revenue Analysis Charts

The Order Revenue Analysis Chart shows the total revenue for orders generated by campaign. Before you can create this chart, you must verify that an order is associated with a response. If it is not, you can associate it using the following procedure.

To associate an order to a response

- 1 Navigate to the Campaigns screen.
- 2 Select a Campaign with the Response Type set to Response.
NOTE: This chart only shows data for campaigns with Response Type set to Response.
The Response Type field is in the Response's view tab, after drilling down on the campaign name.
- 3 Click the campaign name.
- 4 Click the My Contacts/Prospects view tab.
- 5 Click Create Response.
- 6 For this response, click the Orders tab, and create a new record.
- 7 Click the Order number to enter details for the order.

Displaying Campaign Trend Analyses

You can display campaign trend analyses using two charts:

- Campaign Trend Analysis Chart
- Campaign Trend Analysis by Employee Chart

Displaying a Campaign Trend Analysis Chart

The Campaign Trend Analysis chart displays the total number of responses for each campaign over a period of time. The period can be set to day, week, month, quarter, or year.

Before generating the chart, review responses for each campaign by navigating to the Campaigns view, selecting the campaign, and clicking the Responses view tab.

Displaying a Trend Analysis by Employee Chart

The Campaign Trend Analysis by Employee chart displays the total number of responses generated by each employee across campaigns over a period of time. The period can be specified by day, week, month, quarter, or year.

To verify that each response is associated with an employee

- 1 Navigate to the Campaigns screen.
- 2 In the Campaigns list, click the Name.
- 3 Click the Track Results view tab.
- 4 In the Track Result link bar, click Responses.
- 5 Review the list of responses, making a note of the description and user.
- 6 Navigate to the Responses screen.
- 7 For each response you found in [Step 5](#), make sure that the Created By field contains the User ID of the employee who handled the response and, therefore, owns it.

Process of Displaying Response Charts in Siebel Campaigns

Siebel Marketing and Siebel Campaigns include response charts. Use response charts to analyze response to your campaigns in areas such as opportunities, revenue, campaign offers, and so on. When you display a chart, the saved query in the upper-right corner filters the information shown in the chart.

To display response charts in Siebel Campaigns, perform the following tasks:

- [Accessing the Response Charts on page 176](#)
- [Displaying the Campaign Analysis \(Response\) Charts on page 176](#)
- [Displaying the Opportunity Analysis \(Response\) Charts on page 176](#)
- [Displaying the Offer Analysis \(Response\) Charts on page 177](#)
- [Displaying the Offer Type Analyses \(Response\) Charts on page 177](#)
- [Displaying the Revenue Analysis \(Response\) Charts on page 178](#)
- [Displaying the Average Opportunity Revenue Analysis \(Response\) Charts on page 178](#)

Accessing the Response Charts

Response charts analyze the response to your campaigns in areas such as opportunities, revenue, campaign offers, and so on.

To access Response charts

- 1 Navigate to the Responses screen > Charts view.
- 2 In the Charts view use the visibility filter to select the type of data to display.
- 3 In the drop-down list below the Show field, select the type of chart, and click Go.

To change the type of chart, select a different type, and click Go.

Displaying the Campaign Analysis (Response) Charts

The Campaign Analysis chart displays the total number of responses for each campaign. Before you can create this chart, you must verify that the response is associated with a campaign. If it is not, you can associate it using the following procedure.

To associate the response to a campaign

- 1 Navigate to the Responses screen.
- 2 In the Campaign Name field, associate the response with a campaign.

Displaying the Opportunity Analysis (Response) Charts

The Opportunity Analysis chart displays the total number of opportunities created for each campaign, based on the Source field in the opportunity record. Before you can create this chart, you must verify that opportunities have been created for the campaign.

If no opportunities have been created for the campaign, you can create them using the following procedure.

To verify the opportunities are created

- 1 Navigate to the Responses screen.
- 2 For each response to your campaign, verify that opportunities are created (if applicable).

To create an opportunity for the campaign

- 1 Select the response record in the Responses list.

- 2 In the Response form, click Create Opportunity.

An opportunity is created for the campaign and the campaign name is entered in the Source field for the opportunity.

Displaying the Offer Analysis (Response) Charts

The Offer Analysis chart shows the total number of responses per offer based on the offer associated with the response. Before you can create this chart, you must verify that the correct offer is associated with the response.

To verify the correct offer is associated with the response

Perform the following tasks before generating the chart:

- 1 Navigate to the Responses screen.
- 2 For each response to campaigns featuring the offer, make sure the correct offer is associated with the response by reviewing the response record's Offer field.

Displaying the Offer Type Analyses (Response) Charts

You can display offer type analyses (response) through two different charts:

- Offer Type Analysis (Response) Chart
- Offer Type Analysis (Response) by Campaign Chart

Displaying Offer Type Analysis (Response) Charts

The Offer Type Analysis chart displays the total number of responses for each offer type across all campaigns. Before you can create this chart, you must verify that the offer is identified for the response.

To verify the offer is identified for the response

- 1 Confirm that each offer associated with the campaign has an offer type and offer name specified. For more information about finding or completing these fields, read [Creating, Modifying, and Associating Products with Offers on page 72](#).
- 2 Add the responses received during the campaign.
The offer is identified for the response in the Offer Name field.
- 3 Generate the chart, using the procedure on [Process of Displaying Response Charts in Siebel Campaigns on page 175](#).

Displaying Offer Type Analysis (Response) by Campaign Charts

The Offer Type Analysis by Campaign chart displays the total number of responses per offer type for each campaign. Each campaign can have many offers.

To generate the Offer Type Analysis by Campaign chart

- 1 Confirm that each offer associated with the campaign has an offer type and offer name specified. For more information about finding or completing these fields, read [Creating, Modifying, and Associating Products with Offers on page 72](#).
- 2 Confirm that the offers you want in the chart have been added to the campaign. For more information about this procedure, read [Associating Offers with Campaigns on page 123](#).
- 3 Add the responses received.
- 4 Generate the chart, using the procedure on [Process of Displaying Response Charts in Siebel Campaigns on page 175](#).

Displaying the Revenue Analysis (Response) Charts

The Revenue Analysis (Response) chart displays the total revenue for each campaign and the total number of opportunities for each campaign. The bar chart shows the revenue by campaign and the line graph shows the number of opportunities for each campaign.

Values for this chart are derived from the Revenue and Source fields in the Opportunity screen's My Opportunities or All Opportunities list. The revenue number is derived from the sum of the Revenue fields in the Opportunity records, with the Source field set to the campaign name. Before generating this chart, make sure to complete these fields for opportunities used in this analysis.

Displaying the Average Opportunity Revenue Analysis (Response) Charts

The Average Opportunity Revenue Analysis chart displays the average revenue for each campaign. For each opportunity created for the campaign, the revenue is added and the average is taken across opportunities created for the campaign.

Values for this chart are derived from the Revenue and Source fields in the Opportunity screen's My Opportunities or All Opportunities list. The revenue number is derived from the average of the Revenue fields in the Opportunity records, with the Source field set to the campaign name. Before generating this chart, make sure to complete these fields for opportunities used in this analysis.

9

List Management

Use List Management to create and manage lists of contacts and prospects within applications for use in marketing campaigns.

This chapter contains the following sections:

- [Siebel List Management Module on page 179](#)
- [Process of Importing and Managing External Lists on page 180](#)
- [Process of Creating and Managing Internal Lists and Subscription Lists on page 193](#)
- [Promotion of Prospects to Contacts on page 198](#)
- [Process of Viewing and Maintaining Lists on page 201](#)
- [Integrating List Management with D&B on page 205](#)

Siebel List Management Module

The List Management module is available to users with a license for Siebel Marketing or Siebel Campaigns.

NOTE: The Siebel Campaigns module can be added to any base application, including Siebel Sales, Siebel Call Center, and Siebel PRM.

Use List Management to create and manage lists of contacts and prospects within your applications for use in marketing campaigns. A *list* in Siebel Marketing is a grouping of contact or prospect records in the Siebel database.

Contacts are customers already in the Siebel database. Prospects are potential customers that have yet to be screened, qualified, and promoted to contacts. By using this distinction, List Management can eliminate prospects that do not qualify for promotion to contacts.

For example, you rent a magazine subscriber list containing 1,000 names and addresses. You want to contact these people, but because the list is rented, you may not add the records into your Siebel database as contacts unless they become customers generating revenue. You must be able to remove the names from your database when you return the list. Use Siebel List Management to identify these names and addresses as temporary prospects until they can be promoted to contacts.

Process of Importing and Managing External Lists

External lists are created by importing an external file into your application using the List Import utility. Imported lists can come from any source, as long the list can be saved in one of the supported file formats, including Comma Separated, Tab Delimited, and Fixed Width. Common examples of list sources include rented or purchased lists from marketing bureaus, registration lists from trade shows or events, and output lists from other applications.

When you integrate Siebel Marketing or Siebel Campaigns with Siebel Data Quality (optional module), incoming records can be cleansed and matched against existing contacts and prospects in the database. This additional process helps prevent creation of duplicate records for incoming prospects that are already contacts. For more information about Siebel Data Quality, read *Siebel Data Quality Administration Guide*.

To import and manage external lists, perform the following tasks:

- [Verifying Preinstallation Requirements on page 180](#)
- [Creating Records for Importing External Lists on page 184](#)
- [Matching Approach and Match Resolution on page 184](#)
- [Selecting Matching Approach and Match Resolution on page 185](#)
- [Mapping External List Columns to Database Columns on page 186](#)
- [Maintaining Attributes for List Records on page 189](#)
- [Mapping Fields on page 190](#)
- [Applying List Import Formats on page 191](#)
- [Displaying Import Status and Error Messages on page 192](#)

Related Topics

- [About Importing External Lists on page 183](#)
- [Launching Import Requests and Tracking the Import Status on page 187](#)
- [Campaign and Response Data on page 188](#)
- [List Import Format Settings on page 191](#)

Verifying Preinstallation Requirements

Before importing a list, you need verify the status of the server components, the data quality settings, and the structure of the incoming data.

Verifying Status of Server Components and Tasks

Before importing a list, you need to verify that server components are enabled and that server tasks are running.

To enable server components and run tasks, you use the Administration - Server Configuration screen, Components view. For more information, read *Siebel System Administration Guide*.

Make sure that the following server components are enabled and the following server tasks are running:

- List Import Service Manager: Enabled.

Clicking Launch Import in the List Import view tab of the List Management screen submits the import request. The actual import is performed by the List Manager server component on the Siebel Server.

- Server Request Processor: Running.
- Server Request Broker: Enabled or running.

To import a list, you must be connected to the Siebel Server. If the client cannot detect a running Siebel Server at the time you launch the import, you receive a warning message. You can continue to submit the import request if you are sure that a Siebel Server is available to handle the request later.

For the request to be queued, you must have a Siebel Gateway Name Server running in the background. The request is routed through the gateway name server to a Siebel Server that has the List Import Service Manager server component enabled. If you do not have a gateway name server running, you receive an error message:

unable to connect to gateway name server.

Verifying Data Quality Settings

When you use the optional Data Quality module, you should verify your settings for the following server components before importing files:

- Data Quality Manager.
- List Import Service Manager.
- The object manager for the application in which your users promote prospects. For example, if you promote prospects using Call Center, you need to enable the Call Center Object Manager.

If you need to enable a server component, read *Siebel Marketing Installation and Administration Guide*. For more information about data quality configuration, read *Siebel Data Quality Administration Guide*.

To verify the data quality settings

- 1 Verify that these server components are set to Enabled.
- 2 Verify the component parameters for these server components are set for deduplication and data cleansing.

To enable Data Matching:

- a Use the Components view in the Administration - Server Configuration screen and query for each of these server components.

- b** Click the Component Parameters view tab, query for the DeDuplication parameters, and verify that the DeDuplication Enable Flag is set to TRUE.

To enable Data Cleansing during import, query for the Data Cleansing parameters. The Data Cleansing Enable Flag should be set to TRUE.

- 3** Verify the matching threshold for List Import.

The Match Threshold setting in the Data Quality Settings view of the Data Administration screen determines if an incoming name is considered a match with existing data. You can specify a different threshold for List Import than the rest of the Data Quality module.

CAUTION: Reboot Siebel Server before launching any import tasks so that new parameter values take effect. Otherwise, the old parameter values remain in effect.

- 4** Make sure that you set the Data Quality Settings in the Data Administration screen.

You should generate and refresh the match keys for the existing contact and prospect data before importing any files.

To specify a different threshold for List Import

- 1** Navigate to the Components view of the Administration - Server Configuration screen.
- 2** Select the List Import Service Manager.
- 3** Click Component Parameters and query for Dedup Threshold.
- 4** Set the value to the match score threshold that you want to apply to the List Import utility.

Validating the Structure of the Incoming Data

Some columns for a prospect correspond to an LOV (List of Values) or MLOV (Multilingual List of Values) field in the application. Be sure that your incoming data for these columns only use values from the LOV or MLOV. Any nonmatching values are set to NULL in the new prospect record.

The date format is set in the Regional and Language Options control panel for the machine on which the Siebel Server is running. For date fields, you should make sure you use the correct date format that corresponds to the locale settings for your environment.

Common Issues to Check If the Import Is Not Complete

- Check the license keys.
- Check that Disable DataCleansing and Disable DeDuplication settings are not selected. These settings override those specified in the Server Administration screen. They are specified in the Application Administration screen > Data Quality Setting.
- Check User Preference > Data Quality settings. They override those specified in Application Administration.
- If a key is generated but Siebel Marketing did not find any duplicates, verify if the search type is too low and threshold is too high. To change it, use Application Administration-> Data Quality Setting.

- If you are having troubles updating records with List Import, enter it using the List Management screen and check the record's score. List Import assigns the same score. Check to see if the score is below the threshold you normally put (instead of the very low threshold you used for the troubleshooting test).
- Both Real Time DeDuplication and List Import with DeDuplication Enable will insert keys into the key tables. Make sure the following new keys are inserted:
 - Account: S_ORG_DEDUP_KEY table. ACCNT_ID column stores the row id of the account
 - Contact: S_PER_DEDUP_KEY table. PERSON_ID column stores the row id of that contact
 - Prospect: S_PRSP_DEDUPKEY table. PRSP_ID column stores the row id of that prospect
- Batch Key Generate generates keys for old records in the database. If you enable Real Time DeDuplication, you do not need to run Key Refresh that often.
- Make sure you have enabled DeDuplication in the correct Object Manager. The Data Quality Manager is only used by Batch mode tasks, it is not the central server for all Real Time DeDuplication requests. You should enable Real Time DeDuplication in Call Center, but not Data Quality Manager.
- You cannot match against records that did not have keys generated. You need to run Key Generate first if you want to find duplicate records in existing table.
- Key generation should be run at regular intervals. This is done to refresh the generated keys and to include newly added or changed records. Both Batch and Real-Time matching require access to the match keys generated by the key generation process.
- To catch duplicate records for a record entered before DeDuplication was enabled, you should run Batch Key Generate which is used to generate keys for old records in the database.
- If you are using a custom SRF file, test with the standard SRF file.

About Importing External Lists

Lists that you import must be in text (TXT) format. When you import a list, List Management performs the following tasks:

- Loads the list names into the prospects table as individual records.
- Matches incoming names to existing records and handles the matches according to your requirements, based on your settings of Matching Approach and Match Resolution values.
- Saves and reuses the file structure you develop during the import process by mapping the columns of the file.
- Controls the matching and address cleansing settings applied by Siebel Data Quality (optional module).

When the import is finished, the imported list and its associated contacts and prospects display in the List Contacts and Prospects list.

Creating Records for Importing External Lists

Before you import an external list, you must create a record in your application that describes the list. This record tells the list import utility what file to import.

To create a record for importing an external list

- 1 Navigate to the List Management screen > Lists view.
- 2 In the Lists list, create a new record and complete the fields.
Some fields are described in [Table 45](#).
- 3 Save the record.

Table 45. Fields Used to Create a List Record

Field	Comments
Data Type	List Import attempts to determine the format of the attached text file. Values are: <ul style="list-style-type: none"> ■ Comma Delimited. If the first row of data in the file contains a comma in any of the field values, a best practice is to use tab delimited format to make sure that the correct file format is detected. ■ Fixed Width ■ Other Delimited. You can enter another character as the delimiter. If you attempt to add >1 character, the value is truncated. ■ Tab Delimited
List Name	(Required) This field is populated when you add the record, but you can modify the name.
List Type	Automatic. The possible values are Imported, Internal and D&B. If Siebel Marketing detects an incorrect file type during attachment, you can change it.
Source	The company from which the list was purchased. The company must be an account record in the Siebel database.

Matching Approach and Match Resolution

You need to specify how you want duplicates handled before importing a list. If Siebel Data Quality is not installed or enabled, you can elect to use the exact match matching approach. If Data Quality is enabled, you can use Data Quality (intelligent matching) as the only matching approach or you can use Data Quality with exact matching. For more information, read *Siebel Data Quality Administration Guide*. You can choose one of three modes for match resolution, as described in this topic.

Reject Import Record Mode

In this mode, if a match is detected by the matching process, any incoming records matching existing contacts or prospects are not added as new records in the database. Instead, the matching record which already exists in the database is associated with the list. Each skipped record is recorded in the List Import log file for reference. If the incoming record matches more than one existing record, the record with the highest matching score is added to the list and listed in the list import log file.

Overwrite Existing Record Mode

In this mode, if a match is detected by the matching process, any incoming records can overwrite the existing match in the database. The columns that can be overwritten are set by the administrator for the List Import Format used by the file. To set which fields are updated by an incoming record, navigate to the List Import Formats view in the List Management screen and select the Allow Field Updates check box. For reference, the List Import log file records all records that are updated as well as the old and new values for any updated fields.

If you use Overwrite Existing Record as the matching approach and an imported field value does not match any value on the bounded LOV, then the application does not change the field on the existing prospect record (the original value is preserved).

NOTE: Update Existing Duplicates Mode only updates prospect records. It does not update contact records.

Create Additional Record Mode

In this mode, matches are detected but the incoming record is added to the database as new prospect without changing or overwriting the preexisting record. Using this mode the administrator can resolve any matches later on a case-by-case basis or by using the Siebel Data Quality module. To resolve duplicates, you can use the Duplicate Prospect Resolution view tab in the Data Quality view of the Data Administration screen. In resolve mode, all matches are recorded in the list import log file.

NOTE: If the matching process detects a matching contact, the match results do not appear in the Data Quality resolution views. This process can only display matching prospects for resolution.

Selecting Matching Approach and Match Resolution

You need to specify how to handle duplicates before importing a list.

To select a matching approach

- 1 Navigate to the List Management screen > Lists view.
- 2 In the Lists list, select your list.
Some fields are described in [Table 46](#).
- 3 Click the list name.
- 4 Click the List Import view tab.

5 Select a Matching Approach.

The choices are:

- Exact Matching Only. This option uses the fields marked as Exact Match Fields in the List Import Format and queries for any existing contacts or prospects that exactly match the values from the incoming record.
- Intelligent Matching Only. This option uses the data quality matching service to search for matching contacts or prospects.
- Exact and Intelligent Match. This option uses both exact matching and data quality matching. The option first searches for an exact match in the existing contacts and prospects, and then uses intelligent matching to search for matches if no exact match is found.
- No matching. This option disables matching for the import job.

6 In the Match Resolution drop-down list, select an action to apply.

For more details, read [Matching Approach and Match Resolution on page 184](#).

Table 46. Fields Used for List Import View

Field	Comments
Additional Actions	Assign to Campaigns, Responses, or Campaigns and Responses. Used whenever the import file contains campaign history or response data about contacts and prospects. For more information, read Campaign and Response Data on page 188 .
Cleanse Data During Import	A check box for which the default is off. When this flag is checked, incoming records are cleansed by Siebel Data Quality. If your company has not licensed Siebel Data Quality, this feature is not functional.
List Import Format	Indicates the saved column sequence for the file. Formats can be reused across lists. For more information, read Applying List Import Formats on page 191 .
List Import Mode	For descriptions, read Matching Approach and Match Resolution on page 184 .

Mapping External List Columns to Database Columns

Every column in the file to import must be mapped to an existing column in the prospects table in the Siebel Database or to an attribute created for this purpose. If you import response or campaign data, you can also map to response and campaign fields. For more information about mapping attributes, read [Adding Additional Attributes to a List on page 190](#).

CAUTION: Make sure that you map every column before launching the import.

To map list columns to database columns in the prospect table

- 1 Navigate to the List Management screen > Lists view.

- 2 Click the list name.
- 3 Click the List Import view tab.
- 4 Scroll down to the List Import Format list and map every column to an existing database column in the prospect table or to an attribute created for this purpose.
- 5 In the List Import Format list, save the format in one of the following ways:
 - a The first time you save a format, click Save as New.
Save as New retains the original format and saves the modified format separately. Saved formats appear in the List Management screen's List Imports Formats view tab.
 - b Click Save to overwrite the original format.
Use this save option if you make changes to the mappings and want to preserve them.

To verify which database columns are used for matching and update

- 1 In the form in the List Import view, copy the name of the List Import Format in the List Import Format field.
- 2 In the List Management link bar, click List Import Formats.
- 3 Query for the name that you copied in the List Import view.
The lower list displays the columns that you mapped from the import file.
- 4 In the Exact Match Column field, check each column from the list to use for an exact match.
NOTE: These settings are only used when you have selected Exact match or Exact and Intelligent match as the matching approach.
- 5 In the Allow Field Updates field, check the fields to allow to be overwritten when using the Overwrite existing record match resolution.

Launching Import Requests and Tracking the Import Status

After creating a list record, identifying the Matching Approach and Match Resolution, and mapping list columns to database columns, you can import the list and track the status of the request.

To launch a list import request

- 1 Navigate to the List Management screen > Lists view.
- 2 Click the list name.
- 3 Click the List Import view tab.
- 4 In the List Import form, click Launch Import.

After you submit the import request, the status field on the List Import list contains a value of In Progress. You can refresh this view to track the status of your request. When the import is finished, the status field contains a value of Successfully Completed.

There are three methods that can be used to view the status and details of an import job:

- During the import process, end users and administrators can review the List Import task status in the List Management > System Tasks view.
- Administrators can also view the log details for the List Import server task in the Components view in the Server Management Administration screen. In the Component Tasks list, select tasks for the List Import Service Manager.
- Administrators can also review List Import log files.

Campaign and Response Data

List Import can be used to import campaign and Response Data about contacts and prospects. For example, your company may run a campaign against a target list of contacts, but it collects the responses in an external application or through an outside service company. You can import the response results from these sources and attribute the responses to the original campaign.

The List Import view provides the following additional actions that you can select in the Additional Actions field to include response and campaign data in the file:

- **Assign to Campaigns.** Adds the contacts and prospects in the import file to the campaign included in the file. This action does not create any response data.
- **Assign to Responses.** Creates response records for the contacts or prospects in the list. The action does not add, delete, or modify the set of contacts and prospects already associated with the campaign.
- **Assign to Campaigns/Responses.** This action takes contacts and prospects records from the import file, adds them to the campaign, and creates responses for them.

Campaign and response data is not created unless you select one of these additional actions, even if you mapped response or campaign fields. If you do not select an additional action, the import utility ignores response and campaign columns and only creates a list of contacts and prospects.

The List Import view includes the following response fields for mapping import data:

- Offer Code
- Offer Language
- Offer Name (required)
- Response Date
- Response Description (required)
- Response Method
- Response Score,
- Response Status

- Response Type (required)

The List Import view includes the following campaign fields for mapping import data:

- Campaign Name (required)
- Campaign Source Code

When mapping, response and campaign fields, be sure to map all the fields required to create a response in the application. The import provides some default values you do not include all the required fields.

- If you do not specify Offer Name, the response defaults to the primary offer for the campaign.
- If you do not specify Response Type, the type defaults to Unclassified Response.
- If you do not specify Response Description, the type defaults to Imported Response.

If you enable the response business service that performs automatic lookups for Campaign Source Code and Offer Code, you can map the Campaign Source Code and Offer Code fields as an alternative to Campaign Name and Offer Name. In this case, the import utility performs the lookup and defaults to the related Campaign Name and Offer Name. For more information, read [About Using Response Management on page 143](#).

NOTE: The Campaign Source Code field in the List Import mappings indicates the source code value assigned individually to each Campaign Contact and Prospect. It does not refer to the Source Code field in the Campaign record (the field displayed on the Campaign form).

Maintaining Attributes for List Records

Prospects have a predefined set of information fields. These are the standard types of information about your prospects that normally include address, phone number, email address, and so on. These values are defined in Siebel Tools under the Prospect Business Component.

If the list to import has attributes not contained in the standard prospect table, you can create additional attributes to capture the data. After they are created, additional attributes appear on the list of available columns that can be mapped in the List Import view.

An additional attribute can contain any type of information, as long as it can be contained in a single field and can relate directly to the prospect record. For example, additional attributes may include hobbies, special contact information (for example, pager #), product interests, survey responses, or demographic attributes.

Creating Additional Attributes for List Records

To make an additional attribute available during list mapping, you must first make sure your desired attribute exists and then associate the attribute with the specific list.

To create additional attributes

- 1 Navigate to the List Management screen > Additional Attributes view.

- 2 In the Additional Attributes list, create a new record.
NOTE: The maximum number of additional attributes is 19, and no attribute can map to an empty column.
- 3 In the Additional Attribute field, enter the name of the new attribute.
You can create the overall attribute type, such as Hobby or Pager #.
- 4 Enter a description for the additional attribute, if needed.

Adding Additional Attributes to a List

After you create the additional attributes needed to capture the data in the list to import, you must add them to your specific prospect list and map them to one of the List Import columns.

To add additional attributes to a list

- 1 Navigate to the List Management screen > Lists view.
- 2 Click the list name.
- 3 Click the List Additional Attributes view tab.
- 4 In the List Additional Attributes list, create a new record.
- 5 In the Pick Additional Attribute dialog box, select the attribute, and click OK.

Mapping Fields

After you import a list, you must map the fields in the imported list to the fields in the Prospect Business Component. When you do this mapping, the values in the list fields are transferred accurately into the correct fields in the prospect records.

When there is a dedicated column in the prospect table, you should map fields in the imported list to existing fields in the prospects record. Try to avoid mapping fields to additional attribute columns in the database extension table. When a value is stored in the main Prospect table, there is more flexibility to configure the location where the promoted field value should be mapped on the Contact record in the promotion map in the repository. Additional Attribute values can only be promoted to Contact Category data.

To map fields when importing a list

- 1 Navigate to the List Management screen.
- 2 In the List Management link bar, click Additional Attributes.
- 3 Query for each attribute to use, and verify that they exist.
- 4 In the List Management link bar, click Lists.
- 5 Click a list name and click the List Additional Attributes view tab.
- 6 To associate attributes with the list, in the attributes list, create a new record.

- 7 In the Pick Additional Attribute dialog box, perform the following steps:
 - a To create new attributes, create a new record, and in the attributes list, enter a name and description.
 - b To associate predefined attributes to the list, select an attribute, and click OK.
- 8 Associate the attributes with the list using the List Additional Attributes tab.
- 9 Navigate to the List Import view tab.
- 10 At the top of each column in the external list, select the appropriate field or attribute to which the column should be mapped.
- 11 Click Save as New.
- 12 At the top of each column in the external list, select the appropriate prospects record attribute to which the column should be mapped.
- 13 Create additional attributes for columns in your list which have no corresponding Prospect field.

Applying List Import Formats

Before you import a file, you must save the List Import Format (the sequence of columns that correspond to your file). The list format name consists of the list name followed by the saved date/time stamp. For example, My Target List 09/1/2004 12:30:15pm. For more information, read [Mapping External List Columns to Database Columns on page 186](#).

To apply an existing List Import Format to your list

- 1 Navigate to the List Management screen.
- 2 Click the list name.
- 3 Click the List Import view tab.
- 4 In the List Import Formats field, click the select button.
- 5 In the List Import Formats dialog box, select a format to use. If necessary, perform a query to locate the format.

NOTE: You may not be able to apply an existing format to a fixed-width file if the data was originally created for comma separated or tab delimited file. For CSV or tab delimited files, the column width value defaults to 20, and this value may not match the width of the fixed width file that is being used.

List Import Format Settings

You can administer the precise settings associated with your list import format. If the Import Format is to be used in Overwrite Existing Record match resolution, you can specify which columns are allowed to be overwritten in the database. The Allow Field Updates column in the lower list indicates which columns are set to be overwritten. If the column is checked, that field is overwritten in any existing prospect record that matches the incoming record. By default, all columns are unchecked, so that no existing information can be overwritten without the administrator's consent.

If you are using Exact Match or Exact and Intelligent Match as the matching approach, you need to specify the columns that should be used to perform the exact match query. In the List Import Mappings list, check the box in the Exact Match Column column for each list field to be used in the exact match query.

For files with a fixed width file type, the server detects the column width and displays the width in the List Import Formats view. To display the column width settings, from the visibility filter, select List Import Formats and in the List Import Formats list, select the list that relates to your list. If the List Import Format was originally created from a comma separated or tab delimited file, the value defaults to 20, although the width does not have any effect during the import task.

NOTE: Columns mapped to Additional Attributes cannot be updated in Update Mode. If you check Allow Field Updates for this column in the List Import Formats view, the application ignores the setting.

List Import can load a text file in one of three types: comma separated, fixed width, and tab delimited. For files with a fixed-width data type, you can specify the width of each column. The default width is 20. The bottom list displays the column sequence that you have defined in the List Import list. Enter the width in the Width field.

Displaying Import Status and Error Messages

When you launch an import task, the List Import list displays the status of the task. The status may show any of the following messages: Submitted Import Request, In Progress, Successfully Complete, Error, or Completed with Errors.

You can view the detailed results of the List Import task by reviewing the log file from the Siebel Server. The log file contains the following information:

- The status of the file import task (in progress, completed, or error)
- The number of incoming records
- The number of records imported
- Notification of any record that experienced an error
- Notification of any record that detected a duplicate contact or prospect
- Notification of any record that was updated (update mode only)
- Notification of any response record or associated campaign that experienced an error

To view the system task for the List Import job

- 1 Navigate to the List Management screen > System Tasks view.
- 2 Query for tasks in which the Process Name is List Import and the User is the user who submitted the import job.
- 3 Sort the tasks by date and find the task for your list import job.

To verify that the task is for the correct file, read the logging messages in the lower list.

To view the log file for the List Import job

- 1 Navigate to the List Management screen > System Tasks view.
- 2 Query for tasks in which the Process Name is List Import and the User is the user who submitted the import job.
- 3 Sort the tasks by date and find the task for your list import job.
To verify that the task is for the correct file, read the logging messages in the lower list.
- 4 In the lower list, read the Log File field to find the name of the log file.
- 5 Open the log file using any text processing application.

Process of Creating and Managing Internal Lists and Subscription Lists

List Management creates lists of contact and prospect records stored within your applications. Internal lists are created within the List Management module by querying existing contact or prospect records in the database.

After you have created these lists, you can reuse the list any number of times for campaigns. Lists are used by Siebel Marketing and Siebel Campaigns. You can use lists in List Management to serve as subscription lists for Email campaign.

To create and manage internal lists, perform the following tasks:

- [Associating Prospect Lists in Siebel Marketing on page 193](#)
- [Creating Internal Lists on page 195](#)
- [Adding Prospects or Contacts to Internal Lists on page 196](#)
- [Creating Lists of Prospects Using Additional Attributes on page 196](#)
- [Creating and Managing Subscription Lists on page 197](#)

Associating Prospect Lists in Siebel Marketing

Marketing campaigns can include prospects in a using one of the following approaches:

- Associating an internal list of prospects with the campaign.
- Associating a segment from the Marketing segmentation module where the campaign load list format is configured to load the Marketing Prospect integration object.

To associate an internal list with a campaign

- 1 Navigate to the Campaigns screen > Campaign List view.
- 2 Click the campaign Name.
- 3 Click the Design tab.

- 4 In the Design link bar, click Segments/Lists.
- 5 Click Add List to associate an internal list.
To associate more lists, repeat [Step 5](#).
- 6 After the desired lists are associated, click the menu on the upper campaign form and choose Load Campaign to associate the members of the list to the campaign.
- 7 Pick a time and date for the load request, and click OK.

Marketing campaigns can include prospects in a using one of the following approaches:

- Associating an internal list of prospects with the campaign.
- Associating a segment from the Marketing segmentation module where the campaign load list format is configured to load the Marketing Prospect integration object.

To associate a segment of prospects with a campaign

- 1 In the Marketing Module, create a segment. Make sure that the Campaign Load List Format for the segment is configured to load data into the Marketing Prospect integration object.
- 2 Navigate to the Campaigns screen > Campaign List view.
- 3 Click the campaign Name.
- 4 Click the Design tab.
- 5 In the Design link bar, click Segments/Lists.
- 6 Click Add Segment to associate the segment.
If the segment has never been used in a campaign previously, click Choose a new segment, and select the segment from the folder location where you saved it.
- 7 To associate more segments, repeat [Step 6](#).
- 8 After the desired segments are associated, click the menu on the upper campaign form, and choose Load Campaign to associate the members of the segment to the campaign.
- 9 Pick a time and date for the load request, and click OK.

[Table 47](#) describes how prospects and contacts can be used in segments associated with campaigns.

Table 47. Scenarios for Using Segments of Contacts and Prospects in Campaigns

Scenario	Data Source	Integration Object	Comments
Segment contains only contacts	Siebel OLAP or Siebel OLTP	Marketing Contact	Fully supported. Contacts exist in the Siebel transactional database, so data is inserted only into the S_CAMP_CON table.
Segment contains only contacts	Non-Siebel database	Marketing Contact	Fully supported. New contacts and accounts (if mapped) are created in the Siebel transactional database.

Table 47. Scenarios for Using Segments of Contacts and Prospects in Campaigns

Scenario	Data Source	Integration Object	Comments
Segment contains only prospects	Siebel OLAP or Siebel OLTP	Marketing Person	Fully supported. Prospects exist in the Siebel transactional database, so data is inserted only into S_CAMP_CON.
Segment contains only prospects	Non-Siebel database	Marketing Prospect	Fully supported. New prospects are created in the Siebel transactional database.
Segment contains contacts and prospects	Siebel OLAP or Siebel OLTP	Marketing Person	Fully supported. Contacts and prospects exist in the Siebel transactional database, so data is inserted only into S_CAMP_CON and S_DD_USER_KEY tables.
Segment contains contacts and prospects	Non-Siebel database	N/A	Currently not supported.

Creating Internal Lists

The contacts or prospects you target for each campaign vary depending on the campaign objective. For example, you may want to select the contacts who have a certain job title or live in a specific ZIP or Postal Code. In another campaign, you may want to combine sets of contacts or prospects that were selected by several different criteria into a single list.

You create an internal list of contacts or prospects in the List Management screen using the Contacts or Prospects view. You can also use these views to add contacts or prospects to existing lists.

NOTE: To create an internal list, your employee login must have a responsibility associated with it that includes the List Management views.

You can reuse lists in any number of campaigns or marketing programs.

To create an internal list of contacts or prospects

- 1 Navigate to the List Management screen > Contacts or Prospects view.
- 2 In the Contacts or Prospects list, select the individuals that you would like to include, or perform a query to find this information.
- 3 After you receive the results of your query, you can select any number of the records for inclusion in the list.
- 4 With the desired records selected, click Add to List.
- 5 In the Pick List dialog box, click Create New List.
- 6 In the second Pick List dialog box, enter a name for the list, and click OK.
- 7 In the Pick List dialog box, select the list you created and click OK.

- 8 To display the new list, in the List Management link bar, click Lists.

NOTE: The list type is defaulted to Internal. You can rename the list to give it a more appropriate reference name or type at any time.

Adding Prospects or Contacts to Internal Lists

Adding to an existing internal list is similar to creating a new internal list. You can use Add to List to attach prospects to a list of type Internal, D&B, or Imported. You can attach prospects from the All Prospects list or the Prospects by Attribute list.

To add contacts or prospects to an internal list

- 1 Navigate to the List Management screen > Contacts or Prospects view.
- 2 In the Contacts or Prospects list, select the individuals to include or perform a query to find this information.
After you receive the results of your query, you can select multiple records for inclusion in the list.
- 3 With the records selected, click Add to List.
- 4 In the Pick List dialog box, select the appropriate list, and click OK.
- 5 To display the new list, in the List Management link bar, click Lists.
- 6 Select the appropriate list, and click the list name.
- 7 Click the List Contacts and Prospects view tab to verify that your selected contacts or prospects have been added.

Creating Lists of Prospects Using Additional Attributes

You can create lists of prospects by querying the additional attribute data for prospects. For example, you may create an additional attribute for hobby and then record these values for many of your prospects. For a campaign, you may want to create a list of prospects with certain hobbies, such as sailing or painting.

You can create a list of prospects by using the Prospects by Attribute list. In this list, the New Internal List and Add to List functions are also available. Query the list of prospects using the appropriate attribute and attribute value. Then, select the desired records and either create a new list or add to an existing list.

Due to the many-to-many relationship between prospects and attributes, you cannot have multiple combinations of attributes and values in a single query. To create of a list that combines queries, for example Hobby = Skiing AND Preferred Language = Spanish, perform separate queries, and use the Add to List function to combine the results.

To create an internal list of prospects using attributes

- 1 Navigate to the List Management screen > Prospects by Attribute view.

- 2 In the Prospects by Attribute list, select one or more prospects to include in your internal list.
- 3 With the desired records selected, click Add to List.
- 4 In the Pick List dialog box, click Create New List.
- 5 In the second Pick List dialog box, enter a name for the list, and click Save.
- 6 In the Pick List dialog box, select the list you created, and click OK.
- 7 To display the new list, in the List Management link bar, click Lists.

To add to an internal list using prospect attributes

- 1 Navigate to the List Management screen > Prospects by Attribute view.
- 2 In the Prospects by Attribute list, select the prospects that you would like to include in your internal list, or perform a query if necessary.

After you receive the results of your query, you can select any number of the records for inclusion in the list.
- 3 With your desired records selected, click Add to List.
- 4 In the Pick List dialog box, select the appropriate list, and click OK.
- 5 To display the new list, in the List Management link bar, click Lists.
- 6 Select the appropriate list, and click the list name.
- 7 Click the List Contacts and Prospects view tab to verify that your selected contacts or prospects have been added.

Creating and Managing Subscription Lists

You can use lists in List Management to serve as subscription lists for Email campaigns. A *subscription list* is a set of contacts or prospects that have indicated that they wish to receive communications about a certain topic. After creating a subscription list, you can associate the list with an Email Offer. Any responses to Subscribe or Unsubscribe from List then adds and removes members from this list.

Before you can create a subscription list, create an internal list of contacts, prospects, or both using one of the following methods:

- The Add to List button in the List Management views
- The Create Target List feature (Siebel Industry Applications only)
- EIM or other custom configuration

To create a subscription list

- 1 Navigate to the List Management screen > Lists view.
- 2 Find the list you created.

- 3 Change the Type to Subscription.

To associate the subscription to an email offer

- 1 Navigate to the Offers screen > Email Offers view.
- 2 Query for an Email Offer with which to associate the list.
- 3 Click the offer and in the form below, add the subscription list.

Promotion of Prospects to Contacts

When a prospect satisfies a set of screening criteria, he or she can be promoted to become a contact. The new contact record contains the same name and address information as the prospect record. The additional attribute data associated with the prospect is promoted to categories and category values for the new contact.

NOTE: You can have duplicate contacts in the same account. For example, duplicate contacts from different companies might belong to the same account.

When you promote a prospect, the application checks for the following items:

- List Management confirms whether Data Quality deduplication is enabled. If so, the promotion matches the prospect against existing contacts. If a match is found, a pop-up window appears showing the matching contacts. You can then pick or ignore the matches and proceed with the promotion:
 - If the user chooses an existing contact from the pop-up window, the prospect record is marked as Promoted and its associations with any campaigns, lists, or responses are linked to the selected contact.
 - If the user ignores all matches in the Pop-up Window, the promotion continues as if no match was detected.
- If Data Quality finds no matching contact or Data Quality is not enabled, the promotion checks whether the combination of the Account Name and Account site fields matches an existing account record.
- If the combination of the Account Name and Account Site fields match an existing account record, one of the following occurs:
 - If the account name exists but the account site is empty, the promotion compares with existing accounts that have the same Account Name and Account Site. If an identical account exists, the promotion links the contact to the existing account. For the prospect address fields, either an update or an insert on the Account Address is performed, based on the combination of Street Address, City, and State (Industry Applications also use Postal Code as well). If there is not a match with an existing account, a new account is created and the prospect personal address becomes the account address.
 - If no account location or account name is specified, an account is not created or associated with the promoted prospect. The prospect personal address becomes the contact personal address.

Promoting Single or Multiple Prospects

You can promote a single prospect or multiple contacts, using the Prospects More Info view or the views in the List Management screen. You can promote multiple prospects using the Promote Many button in some views in the List Management screen. This action promotes any prospects for which Data Quality does not find any matches.

CAUTION: Promotion is only intended for promoting relatively small numbers of prospects at one time (fewer than 100). If you select more prospects, the process could take many minutes to complete. To see the promotion result, you must query repeatedly until the process completes.

Prospects that have at least one matching contact are not promoted when you click Promote Many. If you do not enable Data Quality, selected prospects are promoted to contacts.

When a prospect is promoted, a contact record is created with matching field information, and the prospect is removed from the list of prospects.

To promote a single or multiple prospects using the Prospects More Info view

- 1 Navigate to the List Management screen > Prospects view.
- 2 Use one of the following methods to promote prospects:
 - In the Prospects list, select a prospect record, and click Promote.
 - To promote multiple prospects, select the prospect records to promote, and click Promote Many.

To promote a single or multiple prospects using the views in the List Management screen

- 1 Navigate to the List Management screen > Lists view.
- 2 Click the list name.
- 3 Click the List Contacts and Prospects view tab.
- 4 Use one of the following methods to promote prospects:
 - In the Contacts and Prospects list, select a prospect record, and click Promote.
 - To promote multiple prospects, select the prospect records to promote, and click Promote Many.

To promote a prospect to an opportunity using views in the Campaigns screen

- 1 In Navigate to the Campaigns screen.
- 2 In the Campaigns list, select a campaign.
- 3 Click the Overview view tab.
- 4 In the Overview list, select a prospect record, and click Create Opportunity.

About Promoting a Prospect's Response to an Opportunity

A prospect that responds to a campaign offer can be promoted by promoting the response to an opportunity in the Responses screen. For more information, read [Promoting Responses to Opportunities on page 152](#).

Promotion Map Modifications

List Management provides a default path for information to move from the prospect record to the contact record during promotion. Prebuilt maps specify where in the contact record prospect fields should be copied when a prospect is promoted. List Management provides three prebuilt maps for moving prospect information during promotion. [Table 48](#) contains prospect information.

Table 48. Prospect Information

Map Name	Information Promoted	Source Business Component	Destination Business Component
LM Contact Map	Contact related information such as First Name, Email Address, and Job Title	List Mgmt Prospective Contact	Contact
LM Account Map	Account related information such as Annual Revenue and Line of Business	List Mgmt Prospective Contact	Account:List Mgmt Prospective Contact
LM Business Address Map	Business Address information such as City, Country, and Postal Code	List Mgmt Prospective Contact	Business Address

Using Siebel Tools, you can redirect any of these prospect fields to a field associated with another business component. For example, you may decide that you do not want to use the Alias field for the prospect and would like it to hold some other information such as a Back Office Account ID. You may also want to promote that ID to populate a specific field on the contact record, possibly an extension column added to your implementation. To view or change the promotion map, in Siebel Tools, navigate to Business Components >List Mgmt Prospective Contact > Business Component User Properties.

You can display the destination business component by looking under Business Component User Properties for the List Mgmt Prospective Contact and searching for the Map Name in the Name column. The path for the map is displayed as Destination Business Component: Source Business Component. For example, Contact: List Mgmt Prospective Contact.

In this case, all three default maps use the List Mgmt Prospective Contact business component as the source.

To modify the promotion map, you can change a user property in the map to promote the information to a different field in the Destination Business Component for the map.

Alternatively, if you wish to promote user properties to a destination business component other than the three default maps, you could create a new map for those user properties.

Modifying Map Entries

To insert or modify a map entry, first determine which map to use for a given set of source and destination fields. Then add an entry using the following syntax:

```
Name: Promotion Map:[Destination Integration Component].[Field Name of Destination
Integration Component]
Value: [Field Name of Source Integration Component]
```

- **Map Name.** The name of the map specified under the corresponding row in the Business Component User Properties.
- **Destination Field.** Field in the Destination Business Component to receive source data. The Destination Business Component is map specific but configurable.
- **Source Field.** Field in the Source Business Component from which to extract data. Source Business Component is map specific but configurable.

Example:

```
Name: Promotion Map.Contact.First Name
Value: First Name
```

Each map only works with a specific source and destination Business Component. However, you can make copies of the Business Components and rename them.

To modify the source and destination Business Components of these mappings, modify the following Business Component User Prop:

```
Name Column: [Map Name]
Value Column: [Destination Business Component]:[Source Business Component]
```

Process of Viewing and Maintaining Lists

A list in Siebel Marketing is a group of contact or prospect records in the Siebel database. The list file name is assigned by Siebel Marketing in the following format:

```
{P or L}/[campaign source code][wave code]_[unique identifier].txt
```

NOTE: P stands for Preview and L stands for List.

If there is a need to influence the list's file name, you can change the Campaign Source Code by modifying the Source Code Field in the Campaigns screen's All Campaigns across Organizations view or change the campaign's Wave Code in the Campaigns screen's Waves view tab.

To view and maintain lists, perform the following tasks:

- [Displaying Lists of Contacts or Prospects on page 202](#)
- [Deactivating or Deleting Lists on page 203](#)
- [Removing Prospects or Contacts from Lists on page 203](#)

Displaying Lists of Contacts or Prospects

You can view the list members and details about them in several ways. If you know the name of the list, you can start at the Lists view. To display other lists a contact or prospect may be on, you can also start at the Contacts or Prospects List view.

To display a contact or prospect list from the Lists view

- 1 Navigate to the List Management screen > Lists view.
- 2 In the Lists list, select the list record.
- 3 Click the list name.

The List Contacts and Prospects view appears. This view shows the contacts or prospects on the list you selected. If the Contact column is checked, the person is a contact. In addition, the person's name appears either in the Contact Last Name or Prospect Last Name column to further identify if the person is a contact or prospect.

- 4 Click the Last Name, and one of the following views appears:
 - If you clicked a Contact name, the Contacts > Contacts List view appears, with the Activities view tab selected.
 - If you clicked a Prospect name, the List Management > Prospects view appears, with the More Info view tab selected.

To view contact or prospect information from the Contacts or Prospects List view

- 1 Navigate to the List Management screen > Lists view.
- 2 From the List Management link bar, click Contacts or Prospects.

Depending on which you chose, the Prospect List view or Contact List view appears.
- 3 Select the record of the Contact or Prospect you are interested in.
- 4 Click the Last Name, and one of the following views appears:
 - If you clicked a Contact name, the Contact Detail view appears, with the Activity view tab selected.
 - If you clicked a Prospect name, the Prospective Contact Market Segment view appears, with the Prospect Additional Attributes view tab selected.

Deactivating or Deleting Lists

You can deactivate or delete lists using the following procedures.

Deactivating Lists

Many times lists are acquired from outside sources such as other companies, Web sites, and events such as seminars and trade shows. Because this data typically represents prospective customers who are not active customers, you may wish to deactivate any remaining prospects who have not been promoted to contacts. Additionally, lists can be generated by different users for a specific campaign or business situation, so you may want to keep lists active only for a specified period of time.

To deactivate a list

- 1 Navigate to the List Management screen and select the Lists view.
- 2 In the Lists list, select a list to deactivate.
- 3 In the Lists form, change the status to Inactive, or set the expiration date.

The expiration date is an information-only field and does not affect your use of the list.

Deleting Lists

This action deletes the list as well as the association with any contact or prospect records.

NOTE: Deleting a list does not delete the contact or prospect records, only the association between the list and contact or prospect records. This is because those names may also be used on other lists.

To delete a list

- 1 Navigate to the List Management screen and select the Lists view.
- 2 In the Lists list, select a list to delete.
- 3 Click the menu button and choose Delete Record.

Removing Prospects or Contacts from Lists

You can remove prospects or contacts from lists using the following procedures.

Removing Prospects from Lists

A prospect cannot be removed from a list using the List Contacts and Prospects view, because the prospect may appear on more than one list. You have more control over individual prospect lists when you remove the association between the prospect record and its list. If you remove the list associations for a prospect, the prospect record is deleted.

To remove a prospect from a list

- 1 Navigate to the List Management screen > Lists view.
- 2 Click the list name.
- 3 Click the List Contacts and Prospects view tab.
- 4 In the List Contacts and Prospects list, select a record to remove, and click the first or last name of the prospect.
- 5 Click the Prospect Lists tab.
- 6 In the Prospect Lists list, select and delete the list or lists from which to remove the prospect.
If you select and delete all of the lists, the prospect record is also deleted.

You can also purge all prospects from a list using the following procedure.

NOTE: The contacts that remain in a purged list do not load into campaigns. Do not associate a purged list with a campaign.

To purge all prospects from a list

- 1 Navigate to the List Management screen > Lists view.
- 2 In the Lists list, select the list record.
- 3 In the lower form, click Purge List.
- 4 When the confirmation dialog appears, click OK, and then click OK again to submit the request.
This action removes all prospects where the Promoted By and Promoted Date are NULL (indicating they have never been promoted).
- 5 To confirm the prospects were deleted, drill down on the name of the list in the upper list applet, and go to the List Contacts and Prospects view tab.

Removing Contacts from Lists

Contacts can be removed from all lists, but the Contact record remains in the database.

To remove a Contact from a list

- 1 Navigate to the List Management screen > Lists view.
- 2 Click the list name.
- 3 Click the List Contacts and Prospects view tab.
- 4 In the List Contacts and Prospects list, delete the record.

Integrating List Management with D&B

List Management can be used in conjunction with Siebel Dun & Bradstreet (D&B) Integration Solution to generate lists of prospects from the D&B dataset. Within Siebel Dun & Bradstreet Integration Solution, you can perform a query on D&B accounts and generate a list of prospects from the results of the query. These prospects can then be targeted in a campaign and promoted to active contacts.

List Management uses the D&B D-U-N-S number to provide data consistency throughout this process. The D-U-N-S number is associated with prospects derived from the D&B data. After a D&B prospect is promoted to a contact, the D-U-N-S number is used by the D&B update routine to continually refresh the data for those new contacts and their associated account information.

Viewing Account Data for D&B Prospects

The account related to a D&B prospect may already exist as a Siebel account. You can use the following procedure to view account information after you promote an account from a D&B account to a Siebel account.

To view the account information for a D&B prospect

- 1 Navigate to the List Management screen > Lists view.
- 2 In the Lists list, click the D&B list name.
- 3 In the List Contacts and Prospects list, click the name in the Prospect Last Name field.
NOTE: Make sure you select the Prospect Last Name and not the Contact Last Name.
- 4 Click the More Info view tab.
- 5 In the Prospects list, click the Matched Account Name.
If there is no matching account name, the field is blank.

Promotion of D&B Prospects

When you promote a D&B prospect to a contact, promotion checks if a Siebel account with the same D-U-N-S number exists and the following actions occur:

- If a Siebel account exists with that D-U-N-S number, the promotion proceeds according to the standard promotion process in [Promotion of Prospects to Contacts on page 198](#). After the promotion, any other prospects from that same D&B account are removed from the list.
- If there is no Siebel account with that D-U-N-S number, the application invokes the D&B account promotion, which then promotes the account and its associated contacts, industry information, and other information. For more information, read the chapter about D&B in *Applications Administration Guide*.

NOTE: List Management does not promote a prospect with an invalid D-U-N-S number. A D-U-N-S number is considered invalid if it is not contained in the D&B Accounts table.

10 Setting Up and Using Web Marketing

Siebel Web Marketing is an optional Siebel Marketing module that provides you with the tools and templates to manage and execute Web-based marketing. It provides the Web site visitor a method of viewing a Web offer, downloading literature, and using preconfigured Web response forms to request more information or ask you to contact them by telephone.

You can modify the look and feel of Web Marketing to match your existing Web site.

Siebel Web Marketing Web sites can be deployed in more than one language. For more information about deploying applications in a multilingual environment, read *Global Deployment Guide*.

This chapter contains the following sections:

- [Web Marketing Web Site Visitors on page 207](#)
- [Siebel Web Marketing Installation Requirements on page 209](#)
- [Control of User Access to the Web Marketing Web Site on page 209](#)
- [Default Responsibilities and Users for Web Marketing on page 210](#)
- [Default Campaigns and Default Offers on page 211](#)
- [Use of Siebel Personalization with Web Marketing on page 211](#)
- [Customization of the Web Marketing User Interface on page 212](#)

Web Marketing Web Site Visitors

A Web site visitor can navigate to the Web Marketing home page by typing the URL or by clicking a hyperlink on another Web page. At this point, the visitor is anonymous and can choose to register, log in (with an existing user name and password), or continue to navigate anonymously. When the anonymous visitor arrives at the Web Marketing home page, the default campaign offers and the details for the first offer in the Featured Offers list appear. If the visitor registers or logs in, the visitor sees other campaign offers for which he or she is eligible. For more information about default offers and default campaigns, read the description of featured offers in [Web Marketing Offers Page on page 215](#).

If a contact logs in using the contact's user ID and password, any responses generated by this customer are tagged with the customer's account ID and with the associated campaign ID. For more information about setting up users, read [Default Responsibilities and Users for Web Marketing on page 210](#).

Web site visitors can also navigate to the Web Marketing site by clicking an embedded URL from within an email offer. Only contacts or prospects receive these offers. When an email contact or email prospect clicks an embedded URL, the Web Offer page for this offer appears. Any responses to the offer from this contact or prospect are tagged with the associated campaign ID and offer ID, so marketers can track response rates for specific campaigns. For a list of responses that are captured, read [Response Management on page 213](#).

Visitors to your Web Marketing home page are categorized as follows:

- [Anonymous Visitor on page 208](#)
- [Email Contact on page 208](#)
- [Email Prospect on page 208](#)
- [Logged-In Contact on page 209](#)

Anonymous Visitor

Any visitor can enter the Web Marketing URL into a Web browser and navigate to your Web Marketing home page. This visitor sees no personalized Welcome message and responses are not captured when the visitor clicks a Recommended Product link or downloads literature. However, an anonymous visitor can create a product information or call response by clicking the Send Product Information or Request a Call link in the Offers page or Information page. The profile information that the anonymous visitor enters creates a prospect record that is associated with the responses.

Email Contact

When a contact clicks an embedded link in an email, your Web Marketing home page appears and the Contact Id is set in an anonymous session. At this point, the email contact is not logged in. The contact must be a registered contact and must log in to access profile information in the My Accounts link or to perform any other tasks that require the contact to be a registered contact. The email contact can generate responses by clicking a Recommended Product link, downloading literature, or requesting product information or a telephone call.

In the Web Marketing home page, the contact can log in. After logging in, the email contact becomes a logged-in contact.

If an email contact clicks the My Accounts link during an anonymous session, the User Login (user registration) view appears, requiring the anonymous visitor to log in before continuing.

Email Prospect

When a prospect clicks an embedded link in an email, your Web Marketing home page appears, and the Prospect Id is set in an anonymous session. At this point, the email prospect is not logged in. The prospect must become a registered contact and must log in to access profile information in the My Accounts link or to perform any other tasks that require the prospect to be a registered contact. The email prospect can generate responses by clicking a Recommended Product link, downloading literature, or requesting product information or a telephone call.

In the Web Marketing home page, the email prospect must register as a new contact before the prospect can log in. In the User Login applet, the email prospect can enter a user ID and password or click the New User link to register as a new contact and obtain a user ID and password.

In the User Login view, the User Login (user registration) view appears, requiring the anonymous visitor to log in or to register as a new user before continuing. When registration is complete, the prospect is converted to a new logged-in contact. However, the original email prospect's responses are not associated with the new contact record. After logging in, the email prospect becomes a logged-in contact.

NOTE: If an email prospect clicks the My Accounts link during an anonymous session, the User Login (user registration) view appears, requiring the anonymous visitor to log in or to register as a new user before continuing.

Logged-In Contact

This contact has access to the My Account link and can perform all other tasks that a registered contact is eligible to perform. The logged-in contact can generate responses by clicking a Recommended Product link, downloading literature, or by requesting product information or a telephone call. These responses are associated with the contact record in the database.

Siebel Web Marketing Installation Requirements

Before you install and use Web Marketing, you must install the following:

- **Siebel Web Engine and related components.** To deploy information on the Web and customer applications, you must install the Siebel Web Engine and the components on which it depends. These include a Web server, Siebel Gateway Name Server, and Siebel Server. For more information about installing components, read the Siebel Server installation guide for the operating system you are using.
- **Siebel Applications.** To perform administrative tasks such as server administration, creating Web offers, and managing marketing activities, you must install an employee application such as Siebel eSales and add the Siebel Web Marketing license key. For more information about installing an employee application, read the appropriate administration guide, for example, *Siebel eSales Administration Guide*.

NOTE: Siebel Web Marketing is an add-on module to Siebel Marketing. Siebel Web Marketing requires the Web Marketing Object Manager component, which is part of the Marketing Component Group. For more information about installing Siebel Marketing, read *Siebel Marketing Installation and Administration Guide* and the Siebel Server installation guide for the operating system you are using.

Control of User Access to the Web Marketing Web Site

To control user access in your Siebel Web Marketing Web site, the following options are available:

- Using external authentication using LDAP (Lightweight Directory Access Protocol)
LDAP is an Internet protocol that email programs use to look up contact information from a server.
- Creating database users for LDAP to use in database access
- Defining visibility for views and products
- Assigning a proxy employee
- Creating users through registration or user administration
- Associating users with accounts
- Allowing various levels of access such as Anonymous, Implicit login, and Explicit login
- Customizing access to home and login pages. For more information, read information about the New User link in [Web Marketing Offers Page on page 215](#).
- Using Web Single Sign-on (SSO) functionality
- Allowing another application to log in
- Adding fields to registration forms

For more information on controlling user access, read *Security Guide for Siebel Business Applications*.

Default Responsibilities and Users for Web Marketing

Responsibilities control which views the users can display. The views to which a user has access determines the links and page tabs that the user gets. For example, if a user has a responsibility that does not permit access to the Credit Cards view, no Credit Cards link appears in the My Settings view. If no views within a business object are visible, the page tab that maps to that business object is not displayed.

The responsibilities predefined for Siebel Web Marketing include:

- **Web Anonymous User.** Grants view visibility to anonymous users such as anonymous visitors, email prospects, and email contacts. For more information about these user types, read [Web Marketing Web Site Visitors on page 207](#). This responsibility allows the user to access views that do not have the Requires_Explicit_Login flags set to TRUE in Siebel Tools. For more information, read *Using Siebel Tools*.
- **Web Registered User.** The end user of the application in a business-to-consumer model such as a logged-in contact. For more information about these user types, read [Web Marketing Web Site Visitors on page 207](#). This user has registered and is recognized by the application either through their login, or because the user enters the site by clicking an embedded link in an email offer.
- **Web Corporate User.** The end user of the application in a business-to-business model. A Web corporate user is associated with an account and must be authorized by the Web Delegated Customer Administrator to access the site. An administrator can add new Web corporate users.

For more information about setting up and managing responsibilities, read *Security Guide for Siebel Business Applications*.

Default Campaigns and Default Offers

Assigning a default campaign and offer is part of the Web Marketing setup process. An offer associated with the default campaign can be designated as the default offer.

You specify the default campaign and default offer in the Application Administration screen in the System Preferences view. To assign a default campaign, complete the Default Campaign Code field. To assign the default offer, complete the Default Offer Code field.

The default campaign and default offer determine which offers are presented to the customer during that customer's Web Marketing session. These offers appear in addition to any targeted offers such as an embedded link in an email offer.

For more information about default offers and default campaigns, read the Featured Offers topic in [Web Marketing Offers Page on page 215](#)

Use of Siebel Personalization with Web Marketing

Siebel Personalization delivers personalized content and offers to a customer profile, needs, interests, and history. Personalized content includes greeting users by name, presenting them with content targeted to their needs and interests, and showing them recommended products and offers based on their needs and history.

Using Siebel Personalization, you can define rules to show and hide content dynamically during a visitor's experience with Siebel Web Marketing. Personalization deployment rules can depend on data such as user's profile information, date ranges, company information, products and services that visitor has already purchased or reviewed, and specific session information.

The home page in Siebel Web Marketing includes the salutation applet in the upper-left corner. It typically includes a personal greeting, but it can be configured to deliver targeted content such as product promotions, announcements, birthday greetings, and offer updates. The home page also contains a list of recommended products and featured offers, both of which can be personalized based on user-specific information. Conditional expressions can be used to hide applets under certain conditions.

You manage personalization in the Personalization Administration screen in your application. For more information about administering personalization, read *Siebel Personalization Administration Guide*.

Customization of the Web Marketing User Interface

The product provides a set of Web templates and cascading style sheets (CSS) to create the look and feel of an application. Customers can create their own look and feel by modifying corporate logos, colors, and fonts in the style sheets and Web templates. When you modify these elements, make sure you save a backup copy in case you want to restore the original files.

NOTE: These elements are not automatically upgraded during the upgrade process.

The Siebel Web architecture uses the Siebel Web Engine (SWE) to dynamically generate HTML pages. The SWE uses configuration information in the Siebel Repository (SRF) and HTML layout information in the Siebel Web Template (SWT) to merge data with the template when creating the HTML page.

Web Templates

A Web template defines the layout and formatting elements of the user interface (UI), such as views, applets, and controls. These UI elements are associated with the templates by using Siebel Tools. The associated information is stored in the SRF file. For example, you may have a View object with three applets. You associate a View Template with the view, and map each applet to a placeholder in that template. The advantage of this approach is that the UI objects in the repository are not hard-coded in individual templates. As a result, a number of View objects can share the same template if they share the same layout. The same process and design applies to applet objects.

The three primary templates types are Container, View and Applet. The final HTML pages created by the SWE places the applet in the view and the view in the container. Siebel Business Applications provide numerous applet and view templates with the product. They can be viewed in Tools, but are edited in an external editor. For more information about the physical user interface layer, read *Using Siebel Tools*.

To change the look and feel of your Web site, the following modifications are available:

- Adding or removing applets
- Changing colors
- Changing controls
- Making fields in a form appear
- Modifying behavior caused by clicking a button
- Modifying views and applets
- Modifying Web Templates

For more information about customizing the user interface, read *Using Siebel Tools*.

Web Marketing Without Frames

Customer and partner applications use HTML frames for compatibility when running in browser-based applications. HTML frames creates portions of the browser window that can scroll independently of the rest of the window. For example, you can place the navigation elements in one frame and content in another frame. You can scroll the content while the navigation elements remain in a fixed location.

Customer and partner applications can be implemented without using frames. Before choosing this method, consider the following limitation. In an unframed application, all UI elements exist in the same window. Therefore, the contents list may scroll off the page you scroll down. For example, if you scroll down to review content, the navigation elements may not be visible.

Full-Text Search

Siebel Search for Customers is a subset of the Siebel Search product. Use it to scan database tables and documents for pertinent information. Siebel Search is included with every license of an Oracle Siebel application. For more information about Siebel Search and Siebel Search for Customers, read *Siebel Search Administration Guide*.

Response Management

Siebel Web Marketing to capture a series of responses during a customer interaction. [Table 49](#) lists the responses captured.

Table 49. Responses Captured by Siebel Web Marketing

Response	Description
Clicked on Product URL	Captured when the recipient clicks the embedded link for the product in an email or Web offer.
Clicked on Web Offer	Captured when the recipient clicks the embedded link for a Web offer in an email offer.
Clicked on Web Survey	Captured when the recipient clicks the embedded link for the Web survey in an email or Web offer.
Completed Web Survey	Captured when the recipient clicks Finish on the Web survey view. The survey answers are captured if the Save Answer field is checked for the question on the SmartScript Administration views. For more information, read <i>Siebel SmartScript Administration Guide</i> .
Downloaded Info/File	Captured when the recipient clicks the embedded link for the document that is downloaded in a Web offer.
Requested call back	Captured when the recipient submits a request after clicking the embedded link in an email or Web offer.
Requested more info	Captured when the recipient submits a request after clicking the embedded link in an email or Web offer.

Table 49. Responses Captured by Siebel Web Marketing

Response	Description
Requested Unsubscribe	Captured when the recipient submits a subscription preference updates after clicking the embedded link in the email offer. In addition to the response, the contact profile is updated.
Submitted Source Code	Captured when a contact or prospect enters a source code and offer code in the Do you have Another Offer form in the Offers page.

Additional responses and events can be captured through configuration. For more information, read the event tracking topics in *Using Siebel Tools*.

Siebel Web Marketing Web Site

The Siebel Web Marketing Web site consists of the Offers page, the Information page, and their related views. Using the navigation bar, you can manage your personal profile by changing preferences in the My Settings view.

Web visitors access the My Settings view by clicking the My Account link in the navigation bar of any Web Marketing page. [Table 50](#) lists the links in the My Settings view that users and visitors can use to manage their personal profiles.

Table 50. Personal Profile Links in the My Settings View

Link	Description
Address Book	A list of available addresses for the visitor. Visitors can add, delete, and modify their address, and the changes update their information in the Siebel database.
Credit Cards	A list of available credit cards for the visitor. This view is not required if you do not implement the Siebel eSales module or if you do not want to use credit card management.
Subscription Preferences	A series of channel-specific and general communication preferences for each visitor. This view could be modified through Siebel Tools to include additional subscription preferences, for example by product or area of interest. These preferences could then be used to drive marketing activities for that visitor. This view appears when a visitor clicks on the Request Unsubscribe embedded URL in an email and a response is created when the visitor clicks Submit. The individual's preferences are also updated in the Siebel database.
User Profile	A series of user profile fields, which the visitor can modify. This view can be extended to display additional profile information.

NOTE: Auction Privilege, Lister Payment, Notification Preferences, and Shipping Terms, are not used at this time.

Web Marketing Offers Page

The default home page for Web Marketing is the Offers page. The center applet of this view contains the specific Web offer intended for each Web site visitor. The Offers page provides links to other views, including additional offers, product information, Web surveys, and account and contact profile information.

The Offers page has several configurable applets, which this topic describes.

Salutation

The salutation text that appears depends on the personalization rules that are applied for the visitor who accesses the page. After logging in, registered email recipients or Web users get a greeting customized with their names. An anonymous Web visitor's greeting says "Welcome!" You can change the salutation greeting text in the Personalization Administration views.

NOTE: When Web Marketing is deployed as part of the eCustomer application (a bundle of eSales, eService and Web Marketing), the visitor can display the Offers page (Web Marketing home page) and the eCustomer home page. Because the eCustomer home page has a salutation greeting, the salutation greeting is suppressed in the Offers page (Web Marketing home page).

The New User Link

You can set up the New User link that appears in the User Login applet so a Web site visitor can create a user ID and password for limited access to your Web Marketing Web site. When a visitor clicks New User on the Web Marketing home page, the registration views appears. The process is managed by a workflow business process that you can modify in Siebel Business Process Designer. For more information, read *Siebel Business Process Designer Administration Guide*.

NOTE: If a prospect registers, the prospect is converted to a contact. After becoming a contact, responses captured for the prospect are not associated with the new contact record. For more information, read *Security Guide for Siebel Business Applications*.

Web Offer

The center applet of the Offers page displays Web offer details. The applet contains the contents of the Web offer presented to the visitor. The Offer that appears is determined in the following ways:

- The offer details are based on the Web-offer link that the visitor selects in an email.
- The offer details are based on how Siebel Personalization sorts the offers in the Featured Offers applet. Details for the top offer in the Featured Offers applet appear in the center applet.

NOTE: If no featured offers exist, the Featured Offers area displays nothing.

Recommended Products

This applet contains a list of recommended products, customized for each visitor based on that visitor's Web profile attributes. This list can be modified using the Personalization Administration views. Unidentified visitors get a default listing.

Featured Offers

This applet displays every Web offer for which the contact or prospect is eligible. When a visitor logs onto a Web site and clicks the Send Product Information or Request Call Back link, the response is captured for the default campaign and offer.

Web-offer types have the following characteristics:

- **Web offers associated with the default campaign.** When you specify a default campaign, the offers associated with that campaign appear in the Featured Offers list. The default campaign does not need to be loaded with campaign contacts and prospects. However, the campaign and associated Web offers must have active dates, and the Inbound Active flag must be checked.
- **Web offers associated with other active campaigns.** These have been loaded with contacts and prospects. The offers must have active dates and the Inbound Active flag must be checked. Only those contacts and prospects targeted get these Web offers in the Featured Offers applet.

For more information about setting the default campaign or default offer, read [Default Campaigns and Default Offers on page 211](#).

Information

This applet contains hyperlinks to the following applets in the Information page:

- Downloads
- Send Product Information
- Request a Call

For more information about these applets, read [Web Marketing Information Page on page 217](#).

Do you have another offer?

This applet contains fields that a visitor can use to enter the offer code and source code and then click Submit. An alternate Web offer then appears, and Siebel Web Marketing creates a response.

Web Marketing Product Detail View

When a visitor responds to an offer (email or Web) by clicking an embedded product URL, a page with product details appears for that offer. This view displays details and incentive pricing for the selected offer. The price list associated with the offer determines the price shown in this view. The person who created the offer is responsible for associating the products and the correct price list with the offer. This combination determines the products that can be embedded in the offers and the price that appears. For more information about price list administration, read *Pricing Administration Guide*.

Additionally, this view contains the Related Items applet, showing products that may be of interest to the Web visitor. Items in the Related Items list are based on previous purchases or literature requests.

In addition to viewing details, the Web visitor using Siebel eCustomer may purchase the product from this view by clicking Add Item. After adding the product, the selected item appears in the Last Item Added applet.

NOTE: Checkout functionality exists only if the customer has purchased Siebel eCustomer. If you are not using eCustomer, the Add Item button is unavailable.

Web Marketing Web Survey View

When the Web site visitor clicks an embedded URL for a Web survey in an email or Web offer, a survey wizard appears that navigates the visitor through a series of questions about the product. Survey results can be stored and then analyzed and used for future marketing activities. Web surveys are administered using Siebel SmartScripts. For more information, read *Siebel SmartScript Administration Guide*.

About Adding Unstructured Content

Oracle's Siebel Web Marketing has the ability to display general external and unstructured content in the Web Marketing site using the Microsite Management module. For more information, read *Applications Administration Guide*.

Web Marketing Information Page

Web site visitors can use the Information page to download product information and request more information. The visitor can reach this page clicking the Information page tab. The Information page contains the following applets:

- **Downloads.** Clicking a hyperlink opens the literature using the default viewer for that type of literature. The visitor can sort this list or search for any specific literature item by name, description, type, or date.
- **Request More Information.** Used by visitors to request product information (Send Product Information) and request a telephone call (Request a Call) using response forms.

Web Marketing Send Product Information View

The Send Product Information view displays a form that Web site visitors can complete to request that product information be sent to them.

This view can be accessed from the Offers and Information pages or as an embedded URL link in an email offer or a Web offer. The Available Products area lists products for which more information is available. This is determined by Catalog visibility. For more information, read *Product Administration Guide*.

When the Send Product Information or Request Call Back views are accessed using an offer's embedded URL, the list of products is restricted to the products associated with the offer. The visitor can browse the list, selecting products of interest, and then move the items to the Selected Products list by clicking Add.

A visitor can request information about the one or more items in the Selected Products list by selecting the check boxes. To clear an item from the list, choose a Selected Product item, and then click Remove. After the Web site visitor chooses the products for which he or she wants more information, the visitor clicks Continue to move to the delivery form. In the delivery form, the Web site visitor can choose direct mail, email, fax, or phone as the delivery method, and then fill in the necessary information for the delivery method. When the visitor clicks Submit, the Confirmation view appears listing the products for which the visitor requested information and the delivery information. This information is stored as a response of the type Requested More Info.

Web Marketing Request a Call View

The Web site visitor can use the Request a Call view to request a callback about one or more products. This view can be accessed from the Offers or Information pages or as an embedded URL in an email offer or a Web offer. When accessed from an email or Web offer, the products available are limited to those products associated with the offer. When accessed from the Offers or Information pages, the products are limited by Catalog visibility.

Requests for a telephone call are initiated in the same way as requests for product information, using Available and Selected product lists. After the visitor chooses the products that he or she wants to discuss in a callback, the visitor clicks Continue to move to the Request Call form. There the visitor provides a phone number, the time of day to call, and adds comments. When the visitor clicks Submit, a Confirmation appears containing a list of products for which the visitor requested a callback and a list of call preferences. This information is stored as a response of the type Requested Call Back.

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